



# US Index 2022

Full report

Updated on: 04/10/2023



ATNI is pleased to present the US Access to Nutrition Index 2022, four years after the first Index was published in 2018.

The US Index is a benchmark comparing the commitments and performance of the eleven largest food manufacturers active in the US to deliver healthy, affordable food and beverages enabling consumers to reach healthier diets and to prevent hunger.

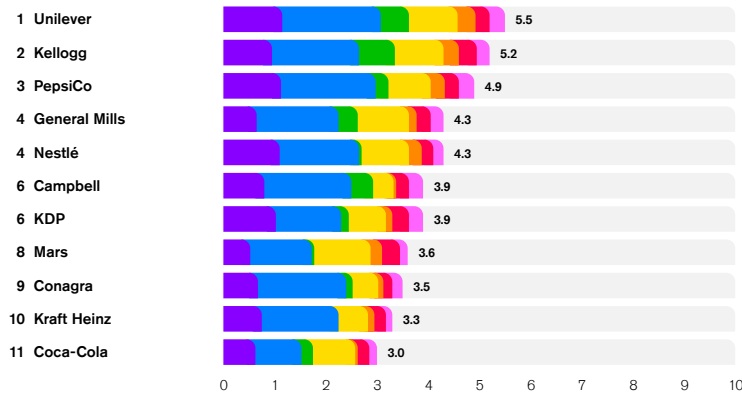
All companies assessed have now placed a greater focus on nutrition in their corporate strategies, and ten manufacturers in some way define what they consider “healthy”. Companies are making explicit commitments to reduce diet related diseases. However, companies must now turn these commitments and policies into action. Despite the introduction of healthier varieties in some product categories by some companies, the combined product portfolios of all eleven companies – representing a sales value of around \$170 billion in 2021 and accounting for approximately 30 percent of all US food and beverage sales – have not become healthier.<sup>1</sup>

The opportunity and urgent need is for all companies to produce and market more healthy products and spend less money marketing unhealthy products.

The food and beverage industry has an important and prominent role to play in addressing key nutrition challenges in the US food system, including food and nutrition insecurity, hunger, high rates of obesity and diet-related chronic diseases, and related nutrition and health inequities. The US Index is intended to be used by companies and by other actors in nutrition and health – including policymakers, investors, and international and non-governmental organizations – to help the food and beverage industry deliver on commitments to address these nutrition challenges. The Index can act as a catalyst to bring about further change in the country’s food and beverage sector. It can help inform and further the US Government’s agenda for hunger, nutrition and health with metrics, data, and recommendations to drive private sector contributions on food access and affordability and the healthiness of packaged food and beverages on the US market.

Read the [Executive Summary](#), or [Report In Brief](#) for this Index.

# Ranking



Most companies scored marginally higher than in 2018. The top score of 5.6 and average score of 4.2 represent limited performance across all companies. Higher scores are primarily a result of more comprehensive and specific nutrition commitments, somehow defining “healthy”, setting reformulation targets, and better transparency regarding companies’ nutrition strategies and performance.



## Methodology

The methodology assesses companies against US-specific and international guidelines, standards and norms, and accepted industry best practices. There are seven categories (topic areas) within the methodology, each carrying a specific weight used to calculate the total Index score on a scale of 0 to 10 with 10 being the highest: A. Nutrition governance and management (12.5%), B. Product portfolio healthiness score, reformulation targets and healthiness criteria (35%), C. Access and affordability of healthy foods (17.5%), Responsible marketing (20%), E. Workforce nutrition (5%), F. Labeling (5%), and G. Lobbying in support of public health interests and engaging external stakeholders to improve companies’ nutrition strategies (5%). A total of 127 indicators are distributed between the different categories.

Read the US Index 2022 methodology: <https://accesstonutrition.org/index/us-index-2022/methodology/>

# Company Scorecards

Based on estimated sales values of packaged foods and beverages in the US, the 11 leading manufacturers included in the US Index 2022 are:



Campbell



Coca-Cola



Conagra



General Mills



Kellogg



KDP



Kraft Heinz



Mars



Nestlé



PepsiCo



Unilever

# The US Context

## Nutrition challenges in the US

This chapter sets out the state of nutrition in the US, the causes of underlying major diet-related diseases, and the role the private sector can play in improving the food environment.

### The diet-driven health crisis in the US

Obesity is a critical and costly public health challenge that affects nearly 41.9% of adults<sup>2</sup> and 15.5% of children between the ages of 10 and 17<sup>3</sup> in the US. Obesity prevalence has increased by 11% since 1999<sup>4</sup>. During the same time, the prevalence of severe obesity increased from 4.7% to 9.2%<sup>5</sup>, with half of US adults projected to experience obesity by 2030<sup>6</sup>. The latest Dietary Guidelines for Americans 2020-2025 (DGA) emphasize the fact that obesity puts people at risk for many serious chronic diseases, including high blood pressure and high cholesterol (which are risk factors for heart disease), Type 2 diabetes, many types of cancer, as well as higher risk of experiencing strokes, clinical depression and anxiety. It therefore recommends Americans limit foods and beverages higher in added sugars, saturated fat, and sodium. At the same time, the DGA recognize the potential for micronutrient deficiencies, considering calcium, potassium, dietary fiber, and vitamin D the dietary components of public health concern for the general US population because low intakes are associated with health concerns.

In this context, it is more important than ever that companies' nutrition commitments include a specific focus on addressing obesity and diet-related diseases.

### Disparities in obesity prevalence

Not all racial, ethnic minority, and income groups are affected by obesity in the same way. It is important to take into account factors that perpetuate and cause obesity when considering solutions to combat obesity. According to the National Health and Nutrition Examination Survey (2021), obesity prevalence was found to be most common in non-Hispanic black adults and families with lower income.<sup>7</sup> While the exact causes for these disparities are not known, they likely reflect the differences in social and economic advantage related to race, ethnicity, and income, where groups of people have systematically experienced greater social and economic obstacles to health.<sup>8</sup> Underlying risks that may help explain disparities in obesity prevalence could include higher rates of unemployment, increased levels of food insecurity, greater access to poor quality foods, less access to convenient places for physical activity, targeted marketing of unhealthy foods, and poor access to health care.<sup>9</sup>

## Obesity and COVID-19

Recent research suggests that obesity increases the risk of severe illness from COVID-19 among people of any age,<sup>10</sup> including children.<sup>11</sup> People who are overweight may also be at increased risk. The Centers for Disease Control and Prevention (CDC) estimated that obesity may triple the risk of hospitalization due to COVID-19 infection.<sup>12</sup> In addition, with increasing BMI,<sup>13</sup> the risk of intensive care unit admission, invasive mechanical ventilation, and death are higher.<sup>14</sup> One study estimated that more than 900,000 adult COVID-19 hospitalizations occurred in the US between the beginning of the pandemic and November 18, 2020, and nearly 30% of these hospitalizations were attributed to obesity.<sup>15</sup>

### Consequences of obesity

People who have obesity, compared to those with a healthy weight, are at increased risk for many serious diseases and health conditions. In addition, obesity and its associated health problems have a significant economic impact on the US health care system. Obesity in children and adults increases the risk for various health conditions, including high blood pressure and high cholesterol, which are risk factors for heart disease; Type 2 diabetes; breathing problems, such as asthma and sleep apnea; joint problems, such as osteoarthritis and musculoskeletal discomfort; and gallstones and gallbladder disease.<sup>16,17,18</sup> Adults with obesity also have higher risks for stroke, many types of cancer, premature death, and mental illness such as clinical depression and anxiety.<sup>19</sup>

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### Healthcare costs of obesity

Healthcare costs are especially higher for people who are overweight or living with severe obesity. Recent research found that health care expenditures are higher for those with excess weight across a wide range of ages and BMI levels, with especially high costs for people with severe obesity. Although childhood obesity contributes to a small proportion of total obesity-related medical costs, excess weight in childhood is a strong predictor of adult obesity. As such, policies to prevent excess weight gain at all ages are needed to mitigate the health and economic impact of the obesity epidemic, which accounts for over \$170 billion in excess medical costs per year in the United States.<sup>20</sup> Annual nationwide productivity costs of obesity-related absenteeism range between \$3.38 billion (\$79 per individual with obesity) and \$6.38 billion (\$132 per individual with obesity).<sup>21</sup> Direct medical costs may include preventive, diagnostic, and treatment services. Indirect costs relate to sickness and death includes lost productivity – such as employees being absent from work for obesity-related health reasons, decreased productivity while at work, and premature death and disability.<sup>22</sup>

# Food and nutrition insecurity

When we think about the reasons why obesity impacts certain racial, ethnic, and income groups harder than others, it has a lot to do with opportunities to make healthy choices. With the economic devastation from the pandemic, food security is now more difficult to achieve. In 2020, an estimated one in eight Americans were food insecure, equating to over 38 million individuals, including almost 12 million children.<sup>23</sup> Extensive research reveals food insecurity is a complex problem. Many people do not have the resources to meet their basic needs; challenges which increase a family's risk of food insecurity. Food insecurity does not exist in isolation, as low-income families are affected by multiple, overlapping issues – like lack of affordable housing, social isolation, economic/social disadvantage resulting from structural racism, chronic or acute health problems, high medical costs, and low wages.

Together, these issues are important social determinants of health, defined as<sup>24</sup> the “conditions in the environments in which people are born, live, learn, work, play, worship, and age that affect a wide range of health, functioning, and quality-of-life outcomes and risks.”<sup>25</sup> For effective responses to food insecurity, it is important to address the overlapping challenges posed by the social determinants of health.

While food security implies access to enough food for an active, healthy life,<sup>26</sup> it is also important to consider how the quality of our diets can help reduce diet-related diseases. This is captured in the United States Department of Agriculture's (USDA) commitment to enhancing (food and) nutrition security. It defines nutrition security as *all* Americans having consistent access to the safe, healthy, affordable foods that are essential to optimal health and wellbeing. It also emphasizes equity and the need to tackle long-standing health disparities.<sup>27</sup>

## Dietary quality

The quality of diet is one of the major contributors in the development of obesity. Infant breastfeeding, intake of sugar-sweetened beverages, and fast-food consumption, as well as the content of family meals, all impact the prevalence of obesity.<sup>28</sup> Lower socio-economic status of many racial and ethnic minorities is a major contributor to suboptimal diets and can be associated with the consumption of calorie-dense foods with less nutritional value – including those high in saturated fats and hydrogenated or partially hydrogenated oils, compared to more balanced diets consisting of healthier options like fresh fruits and vegetables and lean proteins, which are more likely to be consumed by members of wealthier socio-economic backgrounds.<sup>29,30,31</sup>

Choices of less nutritious dietary options among certain groups are not a result of lack of knowledge about healthy foods, but instead the perception of the cost of healthy foods.<sup>32</sup> This perception is not necessarily incorrect. Foods purchased in stores that are higher in nutrients associated with decreased risk for chronic disease – such as those high in dietary fiber, vitamins A, C, D, E, and B-12, beta carotene, folate, iron, calcium, potassium, and magnesium – often cost more than foods with nutrients high in trans fats, saturated fats, and added sugar.<sup>33</sup> However, diets consisting mainly of prepared foods purchased from convenience stores and fast-food chains, as opposed to those purchased from whole food stores, are on average more expensive.<sup>34</sup> However, these estimates of food cost do not consider problems, such as food deserts, lack of access to stores with healthy food, and the effort and time that purchasing and preparing healthy food may take: All factors that may contribute to poor diet both in adults and children from low socio-economic backgrounds.

# Role of the packaged food & beverage industry

The US food industry is one of the largest in the world. According to the USDA, in 2021, US consumers, businesses, and government entities spent \$2.12 trillion on food and beverages and out-from-home meals and snacks<sup>35</sup>. According to Euromonitor, the US retail sales values of packaged food and non-alcoholic beverages are expected to reach 700 billion by 2025.

In doing so, companies are also able to prioritize nutrition efforts, make them better, and scale them up over time.

The COVID-19 pandemic underscored the correlation between nutrition and health, with a subsequent increased interest in health and wellness demonstrated by consumers and regulators. Foodservice closures and capacity limitations to prevent the spread of the virus led to large spikes in retail demand for packaged food.<sup>36</sup>

ATNI's research into the food and beverage companies' responses showed that, while some companies benefitted from increased at-home demand, declines in food service and away-from-home sales offset those gains.



# Availability, access, and affordability of packaged foods

The clearest way in which companies can contribute to healthier food environments is by improving the nutritional quality of the products available on store shelves. In addition to reducing levels of nutrients of concern, such as sodium and sugar, in their products (in-line with the Dietary Guidelines for Americans), companies can also deliver more positive ingredients and nutrients, such as fiber, wholegrains, fruit and vegetables, and essential micronutrients, in their products. However, healthier foods are typically priced higher than less healthy options.<sup>3</sup> Given that low-income households spend an average of 30% of their income on food (compared to 10% for the average American household), price considerations inevitably supersede nutrition quality as a priority for millions of Americans (especially in the current cost-of-living crisis). Therefore, food & beverage manufacturers can make a real difference by offering a wide range of nutritious products at affordable prices at a greater rate than less healthy products.

Another important factor is the accessibility of these products, defined as whether they are readily obtainable by individuals in all geographic locations or not. According to the latest Dietary Guidelines for Americans, access is “influenced by diverse factors, such as proximity to food retail outlets (e.g., the number and types of stores in an area), ability to prepare one’s own meals or eat independently, and the availability of personal or public transportation. The underlying socioeconomic characteristics of a neighborhood also may influence an individual’s ability to access foods to support healthy eating patterns.”

The US Department of Agriculture’s (USDA) 2017 study<sup>37</sup> on food access found that 39m people (12%) in the US live in low-access communities – where at least a third of the population lives over a mile from a supermarket or large grocery store (in urban areas), or more than ten miles away (in rural areas). These are associated with low access to affordable fruits, vegetables, wholegrains, low-fat milk, and other foods that make up a healthy diet. One study has also found a positive association between living in low-access communities and obesity. Companies therefore have a role to play in ensuring their healthier, affordable products are distributed in low-access communities at an equal or greater rate than less healthy alternatives.

# Marketing and labeling

High levels of food marketing, including advertising and promotion, have also been shown to play a substantial role in influencing consumer choice. Food marketing directed to both adults and children of all ages often disproportionately promotes unhealthy foods, such as snacks and drinks high in saturated fat, sugar, calories, and salt. In the US, the primary approach to addressing this issue is through self-regulatory initiatives. For the general consumer, the gold standard in responsible marketing is the ICC Framework for Responsible Food and Beverage Marketing Communications, which sets out general principles governing all marketing communications<sup>38</sup>. Meanwhile, regarding marketing to children, self-regulatory initiatives include the Children's Food and Beverage Advertising Initiative (CFBAI) and Children's Advertising Review Unit (CARU), both administered by the Better Business Bureau (BBB).

Moreover, by providing comprehensive and easily understandable information about the nutritional composition and potential health impact of their products through labeling, companies can help consumers choose the right products to contribute to healthy diets<sup>39</sup>.

# The workplace

The workplace also represents a key food environment for millions of Americans, and the many thousands that work for these companies. Companies can lead by example by providing healthy food at work, nutrition education, nutrition-focused health checkups, and breastfeeding support.

Studies<sup>40</sup> have found positive associations of such programs with productivity and cognitive ability, along with reduced absenteeism, medical costs, and rates of accidents/mistakes. Workforce nutrition programs can also increase employee morale and motivation, improve employer/employee relations, and reduce staff turnover. In addition to these benefits, such programs can help facilitate a company culture with a greater focus on nutrition in its business practices.

## The White House Conference on Hunger, Nutrition, and Health

2022 marks an important time for food and nutrition in the US, with the second White House Conference on Nutrition, Hunger, and Health, held in September 2022. The first White House conference on hunger was held in 1969 at the start of the Nixon administration and helped to greatly expand federal feeding programs. The 2022 conference aimed to catalyze the public and private sectors around a coordinated strategy to accelerate progress and drive transformative change in the US to end hunger, improve nutrition and physical activity, and end the disparities surrounding them.

It is more important than ever for the food and beverage sector to step up and make a difference to facilitate healthier diets for everyone, everywhere, in America. This section has presented several ways through which food and beverage companies' can increase their nutrition efforts, including, among others, product (re)formulation, prioritized marketing of healthier products, labeling, and responsible lobbying. ATNI encourages all companies to step up their efforts to contribute towards healthier diets.

# US Index 2022

## Findings

- The combined product portfolios of the 11 companies assessed— representing a sales value of more than \$170 billion in 2021 and accounting for almost 30 percent of all US food and beverage sales – have not become healthier. Only a third (29 percent) of the companies' combined sales value for 11,041 products is derived from products meeting the “healthy” threshold.<sup>41</sup>
- One of the improvements is in the Governance category, with all companies incorporating a greater focus on nutrition and health in their commercial strategies. Only a few have translated these commitments into concrete action plans that focus on addressing the needs of population groups at higher risk of experiencing nutrition challenges, such as families with low incomes.
- Another improvement is that ten manufacturers now define what they consider “healthy.” However, there is an urgent need for a standardized definition.
- Only four companies, compared to one in 2018, are taking concrete actions to improve the affordability of some of their healthier products in the US. Most companies show limited evidence of making their healthier products or product varieties more affordable or accessible relative to unhealthier varieties specifically through commercial channels in the US.
- Eight companies are evaluating the healthiness of their portfolios as part of broader sustainability strategies and annual reporting frameworks.
- Ten companies, compared to six in 2018, are disclosing information on the relative sales of “healthy” products and adopting their own nutrient-profiling models (NPMs) to monitor the healthiness of their products and portfolios. However, there is no standardized, objective approach to measure healthiness across companies to help consumers make informed choices.
- Responsible marketing for all audiences, but specifically protecting children from the harmful effects of marketing unhealthy products, seems to be on the agenda for all companies, but they do not cover children of all ages, nor do the companies incorporate specific compliance targets. Only one company commissions regular external audits on this topic.
- While most companies are making some commitment to improving the health of their employees in the US, the scope and content of the workforce health and nutrition programs vary considerably.
- Six companies have implemented front-of-pack (FOP) labeling on more than 80 percent of their products and nine display online information for more than 80 percent of their product portfolios: a clear improvement since 2018.

# Findings on Governance

While all companies include a commitment to focusing on nutrition or health in their commercial growth strategies, few show evidence of concrete plans and actions to increase the accessibility and affordability of healthy foods to priority populations in the US. Overall, companies perform well in incorporating nutrition in their corporate strategies, but there are only a few improvements observed in accountability mechanisms: Only four companies link the remuneration of the person accountable for their nutrition strategy to nutrition-related objectives.

## Notable examples:

- Among the companies assessed, Nestlé and Unilever demonstrate the most comprehensive nutrition strategies, management systems, and reporting.
- General Mills is one of five companies that commit to conducting regular management reviews and internal audits of their nutrition strategies.

## Recommendations:

- While 2022 results show more companies are committing to a strategic focus on nutrition and health – as articulated in their mission statements and strategic commitments – they can do more in terms of developing specific objectives and activities to improve nutrition and address malnutrition, and publicly disclose progress against these objectives.
- ATNI recommends that food and beverage manufacturers continue to integrate nutrition considerations into their core business functions, including linking executive pay to performance on nutrition objectives.
- These commitments could then be translated into specific actions, and research conducted into how best to use commercial opportunities to address specific needs of priority populations.

# Findings on Products

The Product Profile results show that a sector-wide transformation is needed to improve the nutritional quality of the US food supply. Only 31% of all unique products assessed (3,381 out of 11,141) meet the independent 'healthy' threshold (an HSR of 3.5 stars or more), with substantial variation observed between companies. Overall, companies with mixed portfolios perform better in the Product Profile (Campbell and Conagra), compared to those that derive most sales from less healthy categories (Mars). Ten companies have adopted an NPM to guide their product (re)formulation strategies and define what products are considered 'healthy/healthier,' compared to six in 2018; Coca-Cola is the only company that has not yet formally adopted such system. So far, no company has publicly shown how the results of applying its own criteria/NPM, compared to applying an internationally recognized NPM to its portfolio. Only three companies have targets in place to increase sales from 'healthy' products, according to their company-specific criteria – and none include a US-specific target. Two companies disclose US-specific sales from 'healthy' products. More companies disclose specific nutrient (re)formulation targets.

## Notable examples:

- PepsiCo published its NPM in a peer-reviewed journal article. The article presents PepsiCo Nutrition Criteria (PNC), a new internal NPM designed to guide and monitor improvements in nutrient density and the overall nutritional quality of foods and beverages. The new PNC NPM assigns food products to four classes of increasing nutritional value, based on the content of nutrients to limit, along with nutrients and ingredients to encourage. The nutrient standards used for category assignment follow those developed by global dietary authorities. Standards are proposed for calories, sodium, added sugars, saturated fats, and industrially-produced trans fats. In the article, the company provides examples of recently reformulated products according to these guidelines.
- Conagra uses an independent NPM (NutriScore) for some product categories. In its 2021 Citizenship report, the company describes the introduction of a new metric, Sustainable Nutrition, as measured by NutriScore A or B for vegan and vegetarian products. According to the company, 82% of its vegan and vegetarian meals and meat replacements currently qualify for this attribute. In addition, Conagra applies the FDA Healthy criteria to its Healthy Choice products, which include soups and ready-to-eat meals. Using external nutrition criteria.

## Recommendations:

- Considering the limited progress in product healthiness of their portfolios, companies can and must do much more to develop and deliver a comprehensive strategy to improve the overall nutritional quality of their portfolios and within product categories. Product innovation, reformulation, diverging from unhealthy product lines, and/or acquiring healthier brand lines are some of the ways companies can achieve this.
- ATNI recommends companies define concrete and time-bound targets to increase sales of 'healthy' products and report progress on delivering against their 'healthy' sales targets on an annual basis. Coupling financial growth targets with higher sales of healthier products could be an effective way to incentivize the increase in 'healthy' products.
- ATNI also recommends companies benchmark their definition of 'healthy' and/or full NPMs against externally validated and preferably internationally recognized (and, where applicable, government-endorsed) systems – such as the planned FDA standard on the criteria to use the term 'healthy' as a nutrient content claim.

# Findings on Accessibility

This category remains the lowest-scoring category of the Index, with an average score of 1.5 out of 10. Most companies show limited evidence of addressing either the affordability or accessibility of their healthy products specifically through commercial channels. With food and nutrition insecurity being a major challenge in the US, it is crucial that companies go beyond federal assistance programs and charitable donations and adopt strategies to increase the commercial accessibility and affordability of their healthy products to those population groups most in need. That said, more companies than in 2018 now have some form of access and affordability strategies in place. However, with the exception on Unilever, companies' affordability strategies pay limited attention to addressing low-income or food-insecure consumers, and none were found to have concrete quantitative targets in place. The predominant approach to addressing access and affordability continues to be through charitable donations instead of a systemic commercial approach. Companies do not have policies in place to ensure donations are predominantly healthy, although two companies showed evidence of tracking the healthiness of their product donations.

## Notable examples:

- Unilever, through its Knorr brand, specifically seeks to price some of its 'healthy' products appropriately for low-income consumers, which is a first for this Index.
- Campbell has started to track the relative pricing of its products that meet its healthiness criteria against the rest of its portfolio and publishes the overall price differential, the first company found to do so.

## Recommendations:

- ATNI recommends that US food and beverage manufacturers adopt a clear policy on affordability and accessibility of healthy products. These include strong, unifying public commitments and SMART (specific, measurable, achievable, realistic, and timely) targets to guide their actions – such as the number/percentage of stores in food-insecure neighborhoods stocking 'healthier' products or the number of food-insecure households to reach through improved distribution, as defined by USDA definitions and ranges.
- Of the companies with affordability strategies in place, most could go further by specifically considering the affordability of their 'healthier' products for low-income consumers in the US. They could begin by conducting pricing analyses to ensure their 'healthier' products are priced appropriately and are affordable for these groups.
- ATNI recommends all companies disclose more information on their affordability strategies, enhancing transparency and accountability.
- Most companies that commit to addressing access to their 'healthy' products predominantly focus on charitable donations and federal assistance programs. These companies are encouraged to translate such commitments into commercial strategies to improve the distribution of their healthy products in low-income/food-insecure areas by working with their distribution and retail partners.
- Where philanthropic activities are undertaken to address food insecurity, it is essential that companies adopt policies and tracking systems to ensure these donations are predominantly healthy, to avoid inadvertently exacerbating malnutrition issues for the populations they are seeking to help.

# Findings on Marketing

Responsible marketing seems to be on the agenda for all companies; however, strategies are not comprehensive and performance remains limited. Where some companies make a commitment to increasing their marketing spending on healthier products relative to overall marketing spending, none of the included companies have set quantitative targets for a specified timespan. As marketing influences purchasing behavior, all companies are encouraged to increase their marketing budgets for the promotion of healthier products relative to unhealthy or standard product varieties and make such commitments public, expressed as a percentage of the overall marketing budget. All companies commit to not marketing or advertising their products in elementary schools, but this commitment is made by just four companies for (junior) high schools. Even fewer companies (two) make such a commitment to marketing in other places where children gather (e.g. YMCAs, after-school clubs, Boys and Girls Clubs, etc.). Companies – and the Children’s Food and Beverage Advertising Initiative (CFBAI) – particularly need to focus on committing to ending marketing in and near secondary schools and extending this pledge to other places popular with children. Where all companies commit to applying their policies for children up to either 12 or 13 years, Unilever has announced it will increase this threshold to 16 years as of 2023. These are positive steps toward increasing the age threshold, but all companies – and CFBAI – are strongly encouraged to apply their policies to all children up to 18 years, protecting them from the harmful effects of marketing unhealthy foods.

## Notable examples:

- Since 2018, Mars was, and remains, the only company that has commissioned an independent, third-party audit of its marketing compliance to all consumers. All companies are recommended to adopt this approach.
- Unilever made a new commitment not to market its products to children, but also announced in April 2022 that, as of 2023, it is raising the age threshold of this commitment to all children under 16. It is the first US Index company to use this age limit and the closest to the International Child Rights Convention’s definition of a ‘child’ (18 years).

The remaining companies commit to only marketing products meeting internal ‘healthy’ criteria to children, of which PepsiCo and Coca-Cola increased the threshold to 13 years. It is also worth noting that the CFBAI is due to raise its age threshold to 13 as of January 1, 2023, requiring all its member companies to do so.

## Recommendations:

- ATNI recommends that US food and beverage manufacturers invest in improving marketing policies that accelerate efforts to drive sales of healthy options. Commitments should align with the International Chamber of Commerce marketing framework, widen the media channels to which policies apply, and explicitly address in-store/point-of-sale and sponsorship marketing in policies.
- While ATNI acknowledges that companies are slowly moving in the right direction, they are encouraged to further increase the age threshold for their marketing restrictions to 18 years, as recommended by WHO, to ensure *all* children are sufficiently safeguarded from the marketing of unhealthy products.
- Marketing restrictions in elementary schools could be extended to include secondary schools, other places where children gather, and areas surrounding these places. Also, an audience threshold of 25% should be adopted by all companies.
- ATNI recommends all companies commit not to market to children at all.
- All companies are encouraged to establish their own independent auditing systems and ensure that they have robust corrective mechanisms in place for when instances of non-compliance are found, and that these are publicly disclosed.



# Findings on Workforce

Eight of the 11 companies make some commitment to improving the health of their employees through workforce nutrition programs involving at least one of the following elements: 1. Healthy food at work; 2. Nutrition Education; and/or 3. Nutrition-related health checkups. Only three companies (Kellogg, PepsiCo, and Unilever) were found to have all three in place. The scope of the workforce nutrition programs varies considerably: Kellogg, Mars, Nestlé, and Unilever were the only companies to demonstrate their programs are available to all company employees, while others limit the availability in some way. Six companies also make these programs available to some staff family members. Only four companies report conducting some form of evaluation on the health impact of their workforce nutrition program in the US during the last three years. Six companies formally commit to both granting paid parental leave, and to providing appropriate working conditions and facilities to facilitate breastfeeding. Another five companies formally commit to granting paid parental leave only.

## Notable examples

- PepsiCo offers an employee wellbeing program called 'Healthy Living,' which is based on three pillars: Be Well, Find Balance, and Get Involved. Healthy eating is a key component of the 'Be Well' pillar, where free fruit is offered onsite and healthy food options are provided in cafeterias. Some locations offer nutrition advice and seminars to employees.

## Recommendations:

- COVID-19 has shown that safeguarding the health and resilience of those working in the food supply chain is key to food security in times of crisis. Hence, ATNI recommends that companies urgently improve and extend their workforce nutrition programs. These programs should contain elements of each of the workforce nutrition pillars, including healthy food at work, nutrition education, and nutrition-related health check-ups. They should be accessible to all employees and their families. Becoming a signatory of the Workforce Nutrition Alliance and utilizing its self-assessment scorecard is a good first step in this regard. Companies are advised to regularly and independently assess the impact of these programs and extend workforce nutrition commitments across the wider food supply chain, both in the US and beyond.
- ATNI recommends that companies that have not yet done so develop robust and publicly available paid parental policies that, at a minimum, go beyond current national regulations, but ideally for six months or more – to support the infant and maternal health of their employees. Companies are encouraged to develop a formal policy on extending support to breastfeeding mothers at work, applying equally in all facilities in the US.

# Findings on Labeling

All companies commit to listing some nutritional information FOP, and six companies have implemented FOP labeling on more than 80% of their products. However, no company commits to implementing interpretive labeling. In the absence of uniform government guidance, companies need to take more responsibility for FOP labeling, to guide consumers in selecting healthier products. Considering the challenge of overweight and obesity in the US, having clear information on pack is important to help consumers make healthier choices. Companies should link interpretive FOP labeling to their NPMs. Encouragingly, all companies display online information for some products: Nine display this information for more than 80% of their product portfolios; a significant improvement over 2018.

## Recommendations:

- Having clear information on pack is essential for consumers to make healthier choices. In the absence of clear government guidelines, companies are encouraged to step up and adopt an interpretive FOP labeling system in the US (as is in place in other countries). Ideally, this system should be applicable to the entire US market.
- Companies could collaborate to identify or adapt an existing interpretive FOP system and draw on experience from the use of such systems in other countries.
- Companies are encouraged to provide detailed nutrition information online for all products in the US to an equal or greater extent than on the physical product. Companies are also advised to display the amount of 'nutrient-dense' ingredients derived from fruits and vegetables contained on relevant product labels in the US, to provide consumers with a better understanding of the nutrient content and healthiness of these products.
- All relevant companies should consider enhancing the information disclosed on-pack regarding wholegrains claims – by displaying the percentage of wholegrains in a product vs. the percentage of all grains – to assist consumers in making informed decisions on the healthiness of products.

# Findings on Engagement

Nearly all companies assessed assign to their boards oversight of their lobbying policies, processes, and activities, and conduct regular reviews of their trade association memberships. Some companies show evidence of lobbying in support of specific government policies to address nutrition challenges in the US, although no evidence of any company supporting key WHO-endorsed policies to address obesity could be found at federal, state, or local level. While most companies are transparent about their direct political contributions on their own domains, companies were less forthcoming about their spending on lobbyists and trade associations, and the spending of their employee-run political action committees (PACs). There was also limited improvement in the comprehensiveness of disclosure of trade association memberships since 2018. Moreover, clear disclosure regarding the companies' lobbying positions on important nutrition-related public health policies remains limited.

When it comes to engaging with governments and policymakers, encouragingly, all companies demonstrate some evidence of engaging with nutrition-related stakeholders in the US, the majority providing a wide range of examples and types: A noticeable improvement since 2018. Nevertheless, disclosure regarding stakeholder engagement lagged significantly behind performance.

## Notable examples:

- PepsiCo discloses its total spending on lobbying in the US annually, as well as publishing the names of its lobbyists and lobbying firms and which state jurisdictions it is actively lobbying in.
- Unilever publishes 'Advocacy and Policy Asks' on its website, covering a range of key nutrition-related policies. The company provides additional detail, publicly specifying under which conditions the company would support (or not support) certain policies, such as mandatory policies to reduce sugar content and FOP labeling.

- All companies could significantly improve their disclosure regarding lobbying positions on key public health policies that would affect the industry.
- Companies could strengthen their lobbying management systems by conducting internal and/or independent third-party audits of their lobbying activities and disclosure to ensure alignment with their policies and/or codes of conduct.
- Companies are encouraged to actively support (or commit to not lobby against) public policy measures in the US to benefit public health and address obesity.
- ATNI recommends that companies ensure their disclosure of trade association memberships in the US is as comprehensive as possible, including the specific dues paid that are used for lobbying purposes and any Board seats held at these organizations.
- To further enhance transparency, companies are encouraged to publish comprehensive lobbying information on their own domains, rather than only on public registries.
- Companies should ensure that – in the process of developing a new nutrition strategy, policy, or other nutrition-related activity, or when updating or reviewing an existing one – they engage directly with a range of stakeholders, such as civil society organizations, academic institutions, and scientific bodies with recognized expertise in nutrition and public health. All companies are encouraged to improve their transparency regarding which specific stakeholders they engage with and the identities (or, at minimum, affiliations) of experts they have consulted, as far as possible. In addition, the degree of financial compensation for these engagements should be disclosed.

# Category Reports

The US Index 2022 assesses companies' nutrition-related commitments and policies, practices and disclosure across seven categories. A product profiling exercise, assessing the healthiness of companies' product portfolios using the Health Star Rating model is also part of the Corporate Profile.



## Governance

### Corporate nutrition strategy, governance, and accountability

The US Index assesses companies' nutrition-related commitments, practices, and disclosures. It is organized into seven thematic categories. This chapter presents the results of Category A, which looks at companies' corporate nutrition strategies and governance, and accountability systems related to nutrition. This Category carries 12.5% of the weight of the overall score.

Category A assesses the extent to which a company's commercial strategy includes a specific commitment to contribute to improved nutrition, and whether this approach is embedded within its governance and accountability mechanisms.

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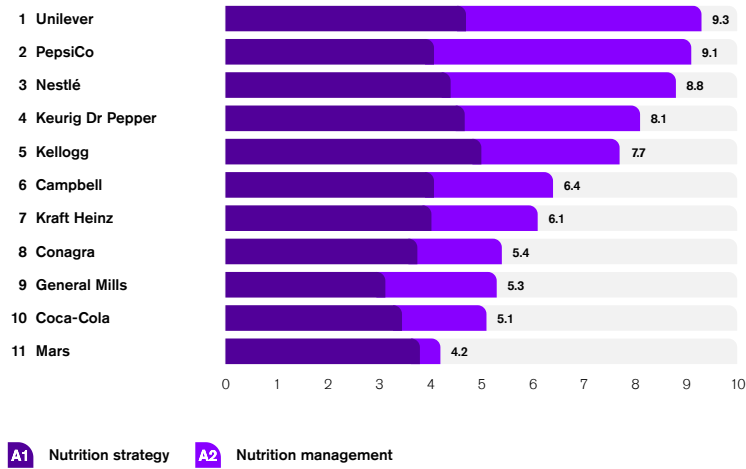
#### Category A consists of two equally weighted criteria:

- A1 Corporate nutrition strategy
- A2 Nutrition governance and accountability

#### To perform well in this category, a company should:

- Have a mission statement and commercial strategy that focuses on health and nutrition to show that they are factored into all major business decisions and functions.
- Address the nutritional needs of people experiencing, or at high risk of, any form of malnutrition (priority populations).
- Use multiple approaches, e.g., product (re)formulation, marketing to address obesity, and diet-related chronic diseases in the US.
- Comprehensively and publicly show progress on its nutrition strategy in the US.
- Assign accountability for implementing its nutrition strategy and/or programs to the CEO or Senior Executive, and undertake regular internal audits and management reviews.
- Link accountable person's remuneration to performance on nutrition-related objectives.

# Ranking



Nestlé and Unilever demonstrate the most comprehensive nutrition strategies, management systems, and reporting among the companies assessed. Overall, companies perform well on incorporating nutrition in their corporate strategies, but there are only a few improvements observed on nutrition governance and accountability mechanisms.

# Category Context

The private sector has an important and prominent role to play in addressing key nutrition challenges in the US, such as obesity, food, and nutrition insecurity. For a food and beverage company to improve all aspects of the business that affect access to nutrition, commitments towards better nutrition should be well embedded in its commercial strategy. This ensures the prioritization of improved nutrition outcomes from the outset: From planning through to implementation and evaluation. It is also important that nutrition-related commitments are owned by the top management of the company. This ensures cohesive integration of such commitments in the company's core business strategy and defines how a company conducts business. In doing so, companies are also able to prioritize nutrition efforts, make them better, and scale them up over time.

Obesity is a critical and costly health concern that affects nearly 41.9% of adults<sup>42</sup> and 15.5% of children between the ages of 10 and 17<sup>43</sup> in the US. Obesity prevalence has increased by 11% since 1999.<sup>44</sup> During the same time, the prevalence of severe obesity increased from 4.7% to 9.2%,<sup>45</sup> with half of US adults projected to have obesity by 2030.<sup>46</sup>

The latest Dietary Guidelines for Americans 2020-2025 emphasize the fact that obesity puts people at risk for many serious chronic diseases, such as Type 2 diabetes, high blood pressure, heart disease, certain types of cancer, and stroke, among others – and recommends Americans to limit foods and beverages higher in added sugars, saturated fat, and sodium. It is therefore more important than ever that companies' nutrition commitments include a specific focus on addressing obesity and diet-related diseases.

Obesity does not affect all groups equally. Recent research suggests stark and deep disparities, with higher rates of obesity among children of color and kids from low-income families.<sup>47</sup> These disparities have been further highlighted by the COVID-19 epidemic. According to the Centers for Disease Control and Prevention, obesity increases the risk of severe illness from COVID-19 among people of any age,<sup>48</sup> including children.<sup>49</sup>

In addition, healthcare costs are especially higher for people who are overweight or living with obesity. Therefore, food and beverage manufacturers have an important role to play in making nutrition commitments that support and promote a healthy weight and prevent extreme weight gain.

When we think about the reasons why obesity impacts certain racial, ethnic, and income groups harder than others, it has a lot to do with opportunities to make healthy choices. With the economic devastation from the pandemic in recent years, food security is now more difficult to achieve. In 2020, an estimated one in eight Americans were food insecure, equating to over 38 million individuals, including almost 12 million children.<sup>50</sup> While food security implies access to enough food for an active, healthy life,<sup>51</sup> it is also important to consider how the quality of our diets can help reduce diet-related diseases. This is captured in the United States Department of Agriculture's (USDA) commitment to enhancing (food and) nutrition security. It defines nutrition security as *all* Americans having consistent access to the safe, healthy, affordable foods essential to optimal health and wellbeing. It also emphasizes equity and the need to tackle long-standing health disparities.<sup>52</sup>

ATNI encourages companies to specifically address the needs of priority populations in their nutrition strategies. ATNI defines priority populations as groups (at risk of or) experiencing malnutrition or obesity at a higher rate than the general population, due to factors outside of their direct control. In the US, this applies primarily to those disproportionately experiencing obesity and/or food and nutrition insecurity in association with multiple complex (and often overlapping) contributing factors, such as: low incomes; geographic factors (e.g., grocery stores far away or communities in which stores only have a limited range of healthy products); and other social determinants of health (e.g., how race/ethnicity influence marketing – all aspects beyond advertising – of foods of different nutritional quality).

There are several ways in which companies can contribute to better nutrition, including product (re)formulation, prioritizing marketing of healthier products, and labeling and responsible lobbying. However, the premise for these efforts is reflected in the company's broader commitment to addressing these issues in its core commercial strategy. For this strategy to translate into effective implementation, it is also important that proper governance and accountability measures are in place and that progress against these objectives is shown comprehensively and regularly in the companies' reporting.

# Relevant changes in the methodology

Overall, the 2022 methodology reduces the attention on companies' non-commercial nutrition-related activities, and instead favors the development and continuation of healthy food and better nutrition policies, and practices embedded in companies' commercial strategies. For Category A, while the weight remained the same (12.5%), the methodology revision resulted in 18 fewer indicators.

## **Summary of changes:**

1. Greater focus on the quality of the strategy to address obesity and diet-related chronic disease in the US, including for priority populations.
2. Several indicators considered not relevant to the US context – such as risk assessments and reporting formats, given that these are regulated – have been removed.
3. As such, criterion A3 on quality of reporting has been removed, also considering that reporting is assessed throughout the Index via disclosure indicators.



# Key Findings

- All 11 companies include a commitment to focus on nutrition or health in their commercial growth strategies. In 2018, seven out of 10 companies did so. Out of these 11 companies, three (Kellogg, KDP, and Unilever) show that these commitments are part of their mission statement in addition to their commercial strategies.
- Four companies make an explicit reference to addressing the needs of priority populations in their nutrition strategy. In 2018, only one company (Kellogg) did so. Within this commitment, Kellogg focuses on food-insecure households, and the other three (KDP, PepsiCo, and Coca-Cola) focus on calorie reduction efforts in communities where health disparities have led to higher obesity rates than the national average.
- All companies show that they are addressing obesity and/or diet related diseases through their nutrition commitments; however, the approaches taken differ between them.
- Five companies have adopted comprehensive approaches to deliver on their nutrition strategies, such as product (re)formulation and responsible marketing. These companies also define nutrition-related objectives rooted in national/international guidelines (like the Dietary Guidelines for Americans), including time-bound targets with baselines. In 2018, only two companies did so.
- All companies have defined explicit accountability arrangements for their nutrition strategy. Five companies show that the CEO or another senior executive is responsible for the company's nutrition strategy, and for three companies, accountability lies with a committee that reports to the board. All companies disclose these arrangements except one. This is a great improvement since 2018, when this was lacking across the board.
- Only four companies link remuneration of the person accountable for their nutrition strategy to nutrition-related objectives.
- In 2018, ATNI found that formal and regular reporting on companies' nutrition strategy in the US was quite limited, with only three companies doing so. In this iteration, seven companies show either substantial US reporting – in the form of a separate report or section on their website or US-specific section in Global Reporting – by detailing progress or providing US-focused examples.

# Notable Examples



A

Unilever is one of three companies that make nutrition and health part of their mission statement and part of their core commercial strategies. In 2020, Unilever launched its new strategy – The Unilever Compass – which builds upon the Unilever Sustainable Living Plan (USLP) 2010-2020. The company's purpose is to 'make sustainable living common place'. Under the 'Improve people's health, confidence and wellbeing' pillar, the company has set six goals on Positive Nutrition, including to "Double the number of products sold that deliver positive nutrition by 2025" and for "70% of our portfolio to meet World Health Organization (WHO)-aligned nutritional standards by 2022." These goals are part of the company's 'Future Foods' strategy. Further, in July 2020, the company published a plan titled 'Transforming the world's food system for a more nutritious, more sustainable, and fairer future', in which it outlines four ways the company is leading change. These include: 1) Nutritious foods and balanced diets; 2) Making plant-based choices available for all; 3) Less food waste; and 4) Food that is fair and doesn't cost the earth. On its US website, the company states: "As one of the biggest consumer goods companies in the world, with a large Foods & Refreshment portfolio, we're mindful of the huge impact we can make through our scale and reach. We aim to produce tasty, accessible, affordable, and nutritious products, and encourage people to make nutritious choices through transparent labeling and balanced portions." On its US website, Unilever has a dedicated section to report progress on its nutrition efforts, including US-specific progress on nutrition targets. In addition, on its global website 'Sustainability performance data', Unilever publishes progress by country.



General Mills commits to conducting regular management reviews and internal audits of their nutrition strategies. The company's 'Bell Institute of Health and Nutrition' reports directly to the Chief Innovation, Technology and Quality Officer, who approves the overall health and wellness strategy and updates the Public Responsibility Committee of the Board of Directors. On an annual basis, this committee reviews the company's actions in furtherance of its corporate social responsibility and sustainability strategies, plans, and objectives. These include matters concerning nutrition, marketing, and advertising. In addition, the company's nutrition plan is reviewed and audited yearly by the Chief Innovation, Technology and Quality Officer.

# A1. Corporate Nutrition Strategy

## To what extent have companies integrated nutrition and health in their core commercial strategies?

All 11 companies include a commitment to focus on nutrition or health in their commercial growth strategies. However, four companies also make this part of their mission statement, which shows how nutrition and health drive their purpose. For example, Kellogg's vision includes a focus on nutrition and health and is integrated into the company's 'Deploy for growth' business strategy. One of its tenets is 'Nourish with our foods' while another is 'Feed people in need'. The company commits to crafting foods that include nutrients of need, address hidden hunger or malnutrition, and support a healthy gut microbiome.

Companies use different approaches to integrate nutrition into their commercial strategies. Some have incorporated nutrition as part of a broader Environmental, Social, and Governance (ESG) framework, where they consider other sustainability dimensions such as packaging and environmental impact. Campbell, for instance, takes a holistic ESG approach of which 'Trusted Food' is one of four pillars. Campbell defines this as 'delicious, wholesome, accessible, food made with trusted ingredients.' According to the company, trusted food is nutrition-focused, accessible, and lower in negative nutrients. Conagra's nutrition strategy is centered on the idea of nourishing consumers with good food that provides them choices, while simultaneously meeting high quality and food safety standards. Unilever also includes in its commitments a focus on making plant-based foods accessible and reduce environmental impact.

Others define their nutrition strategy in the context of positive nutrients and nutrients of concern, often referencing their own nutritional profiling model (NPM). General Mills commits to producing more 'Nutrition-Forward' foods, which is the framework of nutrition metrics defined by the company. 'Nutrition-forward' foods provide at least half a serving of wholegrains, fruit, vegetables, low or non-fat dairy, or nuts/seeds per labeled serving, or meet United States Food and Drug Administration (FDA) 'Healthy' criteria per serving. The company's 'Accelerate business' strategy calls for growing sales across key categories, many of which are 'Nutrition-Forward' foods. Nestlé commits to launching more nutritious foods and beverages, simplifying ingredient lists, and removing artificial colors, while adding micronutrients where they are deficient in the local population and further reducing sodium.

Four companies – Nestlé, Unilever, Mars, and KDP – integrate nutrition within a health and wellbeing component of their strategies. Mars includes in its commercial strategy a 'Nourishing Wellbeing' pillar, which applies to the US and includes commitments to delivering products and services that are trusted and enjoyed. This also involves providing high-quality and transparent information across its entire food portfolio to enable consumers to make informed choices, and continuously improving the nutritional content of its products. The commitment further includes "supporting the wellbeing of people across the global food supply chain by enabling best practice to produce safe, nutritious, and enjoyable food."

**Notable example:** In 2020, Unilever launched its new strategy – The Unilever Compass – which builds upon the Unilever Sustainable Living Plan (USLP) 2010-2020. The company's purpose is to 'make sustainable living common place'. Under the 'Improve people's health, confidence and wellbeing' pillar, the company has set six goals on Positive Nutrition, including to "Double the number of products sold that deliver positive nutrition by 2025" and for "70% of our portfolio to meet WHO-aligned nutritional standards by 2022." These goals are part of the company's 'Future Foods' strategy. Further, in July 2020, the company published a plan titled 'Transforming the world's food system for a more nutritious, more sustainable, and fairer future', in which it outlines four ways the company is leading change. These include: 1) Nutritious foods and balanced diets; 2) making plant-based choices available for all; 3) less food waste; and 4) food that is fair and doesn't cost the earth. On its US website, the company states: "As one of the biggest consumer goods companies in the world, with a large Foods & Refreshment portfolio, we're mindful of the huge impact we can make through our scale and reach. We aim to produce tasty, accessible, affordable, and nutritious products, and encourage people to make nutritious choices through transparent labeling and balanced portions."

### **To what extent do companies commit to addressing obesity and diet-related diseases through their US commercial strategies?**

All companies explicitly make references to addressing obesity and/or diet related diseases through their nutrition commitments; however, the approaches taken differ across them. Six of these companies also include an explicit focus on addressing the needs of priority populations.

The three beverage companies included in the Index – Coca Cola, PepsiCo, and KDP – commit to reducing beverage calories through their association with the Balance Calories Initiative (BCI). With this, they commit to providing more choices with less sugar, putting calorie information up front, removing full-calorie soft drinks from schools, and/or setting responsible marketing guidelines and general awareness-raising campaigns.

Through their association with the BCI, these companies also commit to addressing the needs of priority populations by tracking calorie reduction efforts in five communities in the US – in which health disparities have led to higher obesity rates compared to the national average, and where reducing beverage calories is expected to be most challenging. The most recent evaluation of this work concluded that beverage calories per person fell in all five selected communities and that low- and no-calorie beverages have grown in these communities. Meanwhile, consumption of full calorie beverages have declined, driving an eight to 13% reduction in calories per 8oz serving from the baseline.

With childhood obesity being a major public health concern and its associated increased risk of diet-related diseases, three companies include an explicit focus on tackling childhood obesity in their nutrition strategies. For instance, Kellogg, through its 'Childhood Wellbeing Promise', commits to addressing childhood obesity cohesively through multiple approaches – encompassing access to healthy foods, consumer education, strengthening marketing to children standards, reformulation, and portion control. Unilever also launched new principles on marketing and advertising foods and beverages to children. The company made a new commitment not to market their products to children and, in April 2022, also announced that it is raising the age threshold of this commitment to all under 16s – being the first US Index company to use this age limit and the closest to the International Child Rights Convention's definition of a 'child' (18 years).

Five companies adopt comprehensive approaches to deliver on their nutrition strategies, such as product (re)formulation and responsible marketing. These companies also define nutrition-relation objectives rooted in national/international guidelines, including time-bound targets with baselines, and present them in a cohesive report. The remaining companies include at least two of these four features in their strategies.

**Notable example:** Nestlé adopts a comprehensive approach to deliver on its nutrition strategy and help tackle obesity. The company's commitments cover: Reformulation (decreasing sugars, sodium, and saturated fat, and increasing vegetables, fiber-rich grains, pulses, nuts, and seeds in their foods and beverages); marketing (leveraging marketing efforts to promote healthy cooking, eating, and lifestyles); and portion control (offering guidance on portions for its products). These commitments are accompanied by several time-bound targets in the company's 'Creating Shared Value' report. Nestlé also publicly commits to support US Dietary Guidelines. As a 'National Strategic Partner' with the USDA Nutrition Communicator's Network, several Nestlé USA brands will develop a series of innovative communications efforts to promote the Dietary Guidelines Consumer Messages, encouraging consumers to make healthier food choices and exercise more.

#### **How do the companies comprehensively show progress on their nutrition strategy in the US?**

In 2018, ATNI found that formal and regular reporting on companies' nutrition strategy in the US was quite limited. Only three companies were doing so. In this iteration, seven companies show either substantial US reporting – in the form of a separate report or section on their website or US-specific section in Global Reporting – by detailing their progress or providing US-focused examples. Nestlé, for instance, does not publish a specific report for the US, but includes some reporting into the global report that spotlights specific market data, including US information. In addition, the company has a US-specific website that reports on its commitments.

**Notable example:** On its US website, Unilever has a dedicated section to report progress on its nutrition efforts, including US-specific progress on nutrition targets. In addition, on its global website 'Sustainability performance data', Unilever publishes progress by country.

#### **Recommendations**

To improve and accelerate efforts to enhance consumers' nutrition, leading food and beverage manufacturers are encouraged to:

- Continue integrating nutrition considerations in their core business functions . The 2022 results show more companies are committing to a strategic focus on nutrition and health, as articulated in their mission statements and strategic commitments. However, they can do more in terms of developing specific objectives and activities to improve nutrition and address malnutrition, and to publicly disclose progress against these.
- Conduct research into commercial opportunities available to address specific needs of priority populations, including products and marketing that helps address obesity. Determining such business opportunities requires careful analysis of the population's nutritional needs, as defined by USDA, the 2020-2025 Dietary Guidelines for Americans, and other relevant public authorities.

# A2. Nutrition governance and accountability

## To what extent have companies defined accountability arrangements for their nutrition strategies?

All companies have defined explicit accountability arrangements for their nutrition strategy. Five companies show that the CEO or another senior executive is responsible for the company's nutrition strategy. Kellogg, for instance, includes in its strategy that its approach to nutrition and philanthropy is led by its Senior Vice President, Global Research and Development (who reports to the company's Chief Growth Officer), and its Senior Vice President, Global Corporate Affairs (who reports to the company's CEO).

For the remaining companies, accountability lies with a committee that reports to the Board. For Coca-Cola, the Board's ESG and Public Policy Committee assists in overseeing the company's policies and programs and related risks to the company that concern, among others, progress against the company's ESG goals.

All companies disclose these arrangements except Mars. This is a great improvement since 2018 when disclosure was lacking across the board.

Only two companies link remuneration of the person accountable for their nutrition strategy to nutrition-related objectives, and two companies link remuneration to broader ESG-related objectives, which include nutrition. PepsiCo discloses that the accountable person's remuneration is tied to "continued investment in Pepsi Zero Sugar, which has grown in retail sales compared to prior fiscal year."

**Table 1. Oversight mechanisms in place for companies' nutrition strategy and/or programs**

	Accountability and responsibility for company's nutrition strategy and/or program		Internal business performance evaluation and auditing		
	CEO or other senior Executive	Committee that reports to the Board or Executive Manager	Nutrition strategy approved by the Board	Regular audit of nutrition strategy	Regular management review of nutrition strategy
Campbell	◆	-	✓	-	-
Coca-Cola	-	-	-	✓	-
Conagra	-	-	✓	-	-
General Mills	-	◆	✓	✓	✓
Kellogg	◆	-	✓	✓	-
KDP	-	●	✓	✓	✓
Kraft Heinz	-	-	✓	-	✓
Mars	-	-	✓	-	-
Nestlé	●	-	✓	✓	✓
PepsiCo	●	-	✓	✓	✓
Unilever	●	-	✓	-	✓

● Remuneration specifically linked to nutrition objectives  
 ● Remuneration linked to performance on broader ESG initiatives (of which nutrition is part)  
 ◆ Responsibility assigned, but not linked to remuneration  
 ✓ System in place  
 - No/no information

Five companies commit to conducting regular management reviews and internal audits of their nutrition strategies. For the three beverage companies that are part of the BCI (KDP, Coca-Cola, and PepsiCo), progress is audited by a third party. General Mills' 'Bell Institute of Health and Nutrition' reports directly to the Chief Innovation, Technology, and Quality Officer, who approves the overall health and wellness strategy and updates the Public Responsibility Committee of the Board of Directors. On an annual basis, this committee reviews the company's actions in furtherance of its corporate social responsibility and sustainability strategies, plans, and objectives. These include matters concerning nutrition, marketing, and advertising. In addition, the company's nutrition plan is reviewed and audited yearly by the Chief Innovation, Technology, and Quality Officer.

### **Recommendations**

To improve and accelerate efforts towards robust nutrition governance and management systems, global food and beverage manufacturers are encouraged to:

- Link executive compensation to performance on nutrition objectives and ensure that nutrition plans and strategies are assessed regularly.
- Ensure nutrition plans and strategies are assessed regularly by internal audits and/or are subject to a regular management review to monitor progress.



# Products

## Product Profile and Product Formulation

This chapter presents the results of **Category B: formulating appropriate products**, which carries 35% of the weight of the overall Index score. The **Product Profile**, an independent analysis of the healthiness of companies' US product portfolios, represents criterion B1. The remaining sections assess the extent to which companies have established product (re)formulation targets, and the characteristics and transparency of their nutrient profiling models and or definitions of what is 'healthy'.

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### **Category B consists of three criteria:**

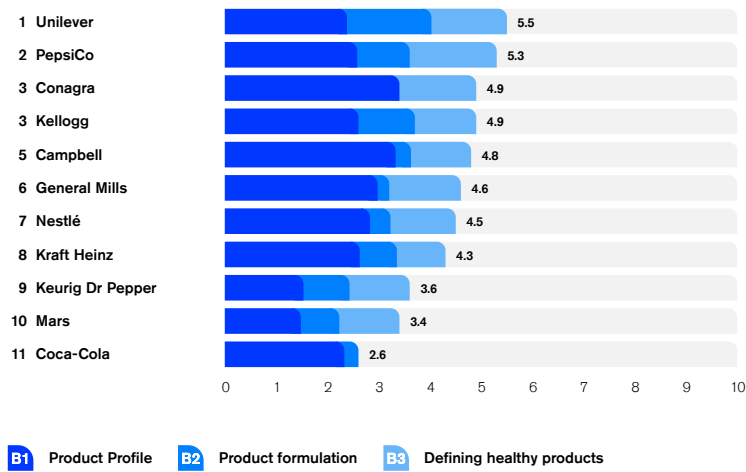
- B1 Product Profile (20% of overall score)
- B2 Product Formulation (7.5% of overall score)
- B3 Nutrient Profiling Model (NPM): Defining 'healthy' products (7.5% of overall score)

### **To perform well in this category, companies should:**

- Derive a majority of US sales from healthier products, measured by ATNI's Product Profile (using the Health Star Rating (HSR))
- Commit to increasing sales/proportion of healthier products in their US portfolios and report on progress annually
- Set and disclose SMART (Specific, Measurable, Attainable, Relevant and Time-bound) product (re)formulation targets for both nutrients of concern and positive nutrients/ingredients
- Adopt and disclose details of an evidence-based NPM, applicable to the whole portfolio and which is externally validated or benchmarked against external standards



# Ranking



Unilever ranks first, followed by PepsiCo; these companies have both set (re)formulation targets and disclose more information relative to their peers regarding their nutrient profiling models (NPMs). Conagra and Campbell rank joint first in the Product Profile. While there have been several notable improvements from companies, especially with regards to their NPMs, overall, results show that most companies still have significant scope to increase their sales from healthier products and improved reporting on US specific progress against reformulation targets.

# Category Context

The COVID-19 pandemic underscored the correlation between nutrition and health, with an increased interest in health and wellness by consumers and regulators. Foodservice closures and capacity limitations to prevent the spread of the virus led to large spikes in retail demand for packaged food.<sup>53</sup> In this context, food companies can play an increasingly important role in helping to improve the nutritional quality of the US food supply. Companies can, for instance, reduce levels of nutrients of concern, such as sodium and sugar, in their products (in line with the Dietary Guidelines for Americans). They can also make nutrition a primary consideration while developing new products and/or acquiring new brands, so they appropriately address nutrition concerns. Companies can improve products to deliver more positive ingredients and nutrients – such as fiber, wholegrains, fruit and vegetables, and essential micronutrients (vitamins and minerals).

Although the pandemic caused many Americans to pay more attention to nutrition in their diets, this has not yet led to better health outcomes. According to a 2020 survey, 85% of Americans made changes in how they eat as a result of COVID-19, showing increased awareness around nutrition and health.<sup>54</sup> At the same time, another study showed that obesity rates among young children (five to 11 years) increased during the pandemic.<sup>55</sup> In the US, the diets of children are largely composed of 'ultra-processed foods,'<sup>56</sup> which have been linked to negative health impacts.<sup>57</sup> When developing new products or reformulating products to make them healthier, food and beverage manufacturers need to consider the overall composition of products – and not just individual nutrients or ingredients.<sup>58</sup> ATNI encourages companies to adopt evidence-based, preferably externally validated, internationally recognized NPMs, along with ambitious time-bound (re)formulation targets.

Although reformulation efforts in the US remain largely voluntary, recent policy developments continue to inform and drive them. A growing number of lawsuits<sup>59</sup> against companies that claim sugary products are nutritious has further exacerbated the importance of companies improving these reformulation efforts and preventing the misleading of consumers. Box 1 below highlights voluntary initiatives aimed at reducing negative nutrients in American diets, and informing reformulation and new product launches across the sector.<sup>60</sup> Apart from regulatory and consumer shifts, there is increasing interest from the finance community in addressing nutrition-related risks. At the Tokyo Nutrition for Growth (N4G) 2021 Summit, a group of 53 institutional investors, representing USD12.4tn in assets under management, called on food and beverage manufacturers to report annually on the healthiness of their product portfolios and sales, and to adopt internationally recognized (and, where applicable, government-endorsed) NPMs to define and show the relative healthiness and overall nutritional quality of their products.<sup>61</sup>

As public health challenges related to nutrition differ by country, and even within countries, there is no universal 'gold standard' for NPMs, either globally or in the US. As a result, there is no universally agreed definition as to what constitutes a 'healthy' product. ATNI encourages companies to adopt internationally recognized (and, where applicable, government-endorsed) NPMs and/or validate their own systems against external standards. In the US, the FDA is in the process of updating its definition of 'healthy,' one of the actions announced in the September National Strategy, which will provide a benchmark for companies. Some companies are already using [FDA current definition of healthy](#).<sup>62</sup> to guide their (re)formulation strategies. However, none have adopted it for their NPM, nor used it to set targets to increase sales from healthier products.<sup>63</sup>

NPMs' strength, when used by a food manufacturer, depends on the rigor of the criteria used and the system used to either a) calculate a score based on multiple food components or b) establish a single threshold system for one of multiple nutrients. NPMs can be used in guiding decisions across the business, including those on investment in research and development (R&D), target-setting to reformulate products, determining which products can be marketed to children, and/or for which products health and nutrition claims can be made.



### **Box 1. Reformulation Guidelines**

In the US, reformulation programs have largely been voluntary. Current programs focusing on reducing levels of negative nutrients in the packaged food supply include:

#### *US Food and Drug Administration (FDA) industry voluntary sodium reduction goals*

The average sodium intake in the US is about 3,400mg per day. However, the Dietary Guidelines for Americans recommends adults limit their sodium intake to less than 2,300mg per day (and even less for children under 14). FDA sodium reduction ambitions were released in October 2021 and cover 163 food categories, with potential for meaningful sodium reduction. The short-term targets aim to support reduction of average sodium intake to 3,000mg per day.<sup>64</sup>

#### *US National Salt and Sugar Reduction Initiative (NSSRI)*

High intakes of sugary foods and beverages are strongly linked to obesity and diet-related diseases, such as type 2 diabetes and cardiovascular disease – the latter being the leading cause of mortality in the US.

NSSRI is a government-supported initiative on voluntary national salt and sugar reduction targets. In February 2021, the initiative released its targets for sugar reduction across 15 categories of foods and beverages. The NSSRI's goal is to "promote gradual, achievable and meaningful reductions in sugar content in packaged foods and beverages."<sup>65</sup> Most categories' targets include cutting sugar by 20% in foods and 40% in beverages by 2026. Research estimates the NSSRI targets would have positive impacts on public health: children and youth would consume 21% less added sugar,<sup>66</sup> and the US could save over USD 4bn in total net health care costs.<sup>67</sup>

### **Box 2. NPMs in the US and the FDA Definition of 'Healthy'**

The World Health Organization (WHO) defines nutrient profiling as "the science of classifying or ranking foods according to their nutritional composition for reasons related to preventing disease and promoting health." Nutrient Profile Models (NPMs) have been developed by academics, governments, health-related charities, and the food industry for a variety of applications, including marketing-to-children regulations, product labeling, and guiding (re)formulation strategies.

To ensure consistency in reporting and evaluating change, ATNI continues to use the Health Star Rating model (HSR) to benchmark and monitor the nutritional quality of company portfolios over time.

Relevant US developments include:

- FDA has released a draft update of requirements to use the term 'healthy'<sup>68</sup> as a nutrient content claim (e.g. food manufacturers may use the term 'healthy' on labels if the food meets nutritional criteria) and plans to conduct studies to find a regulated, voluntary front-of-pack symbol that shows whether a product can be considered 'healthy'.<sup>69</sup>
- The National Strategy on Hunger, Nutrition and Health<sup>70</sup> launched in September 2022 proposed to 'Make sure that foods labeled as "healthy" align with current nutrition science and the Dietary Guidelines for Americans. HHS FDA will propose updating the nutrition standards for when companies use the "healthy" claim on their products and develop a symbol companies may use to depict the "healthy" claim on food packages. HHS FDA will also develop guidance for industry on the use of Dietary Guidance Statements on food labels to help people understand how a food or food group can contribute to a healthy eating pattern.'
- Guiding Stars, a nutrition labeling program used by grocery retailers and other organizations, updated its graphics in 2021 to include the words "good," "better" or "best."<sup>71</sup>
- Food Compass Score NPM, developed by researchers at Tufts University.<sup>72</sup> This new NPM evaluates foods based on multiple characteristics beyond nutrients, for example, additives.

# Relevant Changes to the Methodology

- The weighting of this category increased from 27.5% in 2018 to 35% in 2022. This is due to the integration of the Product Profile, which accounts for 20% of the final Index score. The Product Profile was integrated as a new criterion (B1) under Category B.
- The number of indicators was reduced from 44 in the 2018 methodology to 30 for this iteration. Indicators on R&D expenditures were removed due to low levels of reporting.
- The latest methodology includes an increased focus on companies' adopting a target to increase sales of 'healthy' products and disclosing progress annually.
- An indicator has been added, asking companies to benchmark their definitions of 'healthy' and/or criteria used in their NPM against externally validated NPMs.

# Key Findings

- Out of all products (11,041) analyzed on the Product Profile, 31% met the 'healthy' threshold (having an HSR of 3.5 or more), representing 29% of companies' combined sales value. The average HSR for all companies' products combined was low (2.3 out of 5), with substantial variation observed between companies. Despite this results, ATNI found that eight companies are evaluating the healthiness of their portfolios and disclosing sales of 'healthy' products as part of broader sustainability strategies and annual reporting frameworks. However, only three companies (Keurig Dr Pepper, Kraft Heinz, and Unilever) have targets in place to increase sales from 'healthy' products, according to their company-specific criteria.
- The most reported nutrient (re)formulation targets were found for sodium and sugar. Unilever and PepsiCo have the most comprehensive sodium targets, and both companies shared information with ATNI about how they plan to align their targets to the recently released FDA voluntary sodium reduction guidelines. Four companies disclosed specific targets to increase levels of fruits, vegetables, nuts, and/or legumes in their products. Only one was found to do so in the 2018 Index.
- ATNI found evidence that three companies are collaborating with an external organization, Partnership for a Healthier America (PHA) to verify compliance against their targets. KDP is collaborating with PHA to verify compliance against its target to increase the proportion of healthier beverages in its portfolio (Provide positive hydration in 60% of KDP products by 2022). PepsiCo works together with PHA to serve as an independent verifier of its commitments to reduce added sugar in the beverage portfolio, along with sodium and saturated fats in its foods portfolio.<sup>73</sup> Mars Wrigley has committed, in alignment with PHA, to using  $\leq 25$ g sugar/portion as its guidepost for all new products, beginning with innovation in 2020 for chocolate and 2023 for fruity confections.
- Ten companies have now adopted an NPM or other nutrition criteria to evaluate the healthiness of their portfolios and guide their product (re)formulation strategies. This is a notable development, compared to six companies that were found to do so in 2018. However, companies use varying criteria to define what qualifies products as 'healthy'. Using varying thresholds and metrics that are company-specific makes it difficult to compare across the sector and over time.
- Most companies consider both positive and negative nutrients/ingredients when evaluating their products. Only four companies were found to do so in 2018. However, no company publicly discloses how their own criteria/NPM perform against an externally validated/recognized NPM.

# Notable Examples



PepsiCo published its NPM in a peer-reviewed journal article.<sup>74</sup> The article presents PepsiCo Nutrition Criteria (PNC), a new internal NPM designed to guide and monitor improvements in nutrient density and the overall nutritional quality of foods and beverages. The new PNC nutrient profiling model assigns food products to four classes of increasing nutritional value, based on the content of nutrients to limit, along with nutrients and ingredients to encourage. The nutrient standards used for category assignment follow those developed by global dietary authorities. Standards are proposed for calories, sodium, added sugars, saturated fats, and industrially produced trans fats. In the article, the company provides examples of recently reformulated products according to these guidelines.

B



Food & beverage manufacturers find it increasingly important to assure their stakeholders that their public metrics on nutrition are accurate and reliable. Unilever has set a target to increase sales by volume of products compliant with its own nutrition standards (70% of global portfolio to meet Unilever's highest nutritional standards (HNS) standards by 2022). The company has selected this metric as part of its sustainability assurance program.<sup>75</sup> In addition, the company provides US-specific reporting on progress against this target.

B



Conagra uses NutriScore for some product categories. In its 2021 Citizenship report, the company describes the introduction of a new metric, Sustainable Nutrition, as measured by NutriScore A or B for vegan and vegetarian products. According to the company, 82% of its vegan and vegetarian meals and meat replacements currently qualify for this attribute. In addition, Conagra applies the FDA Healthy criteria to its Healthy Choice products, which include soups and ready-to-eat meals.

B

# B1. Product Profile

The Product Profile is an objective assessment of the nutritional quality of packaged foods and beverages sold in the US market. ATNI rates companies using the Australian HSR. 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' (see Box 3).

ATNI commissioned an independent organization – The George Institute for Global Health (TGI) – to execute the nutrient profiling element of the Product Profile. More details on the methods, results, and limitations of the study are available in TGI's report.

The 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 170bn in 2021, which accounted for approximately 26% of all US food & beverage sales.<sup>76</sup> The percentage of each company's 2021 sales covered in the Product Profile, the categories selected, and the total number of products assessed for each company are shown in Table 1.

**Table 1. Percentage of US sales and product categories included in the Product Profile**

	Total no. products assessed	Categories Included* (Higher sales listed first)	Examples of brands included	% US 2021 retail sales-values represented*
Campbell	1,026	1) Savoury Snacks, 2) Soup, 3) Sauces, Dressings, and Condiments, 4) Baked Goods, 5) Juice	Campbell, Pepperidge Farm, Snyder's, Swanson, Prego, V8	80-90
Coca-Cola	396	1) Carbonates, 2) Juice, 3) Bottled Water – pure, 4) Bottled water – other, 5) Sport Drinks	Coca-Cola, Diet Coke, Sprite, Dasani, Powerade, Minute Maid	90-100
Conagra	1,264	1) Ready Meals, 2) Processed Fruit and Vegetables, 3) Savoury Snacks, 4) Processed Meat, Seafood, and Alternatives to Meat, 5) Dairy	Birds Eye, Healthy Choice, Hunt's, Bertolli	80-90
General Mills	1,540	1) Breakfast Cereals, 2) Sweet Biscuits, Snack Bars, and Fruit Snacks, 3) Ready Meals, 4) Dairy, 5) Soup	Yoplait, Cheerios, Nature's Valley, Progresso, Totino's	80-90
KDP	717	1) Carbonates, 2) Juice, 3) Ready-to-drink (RTD) Tea, 4) Processed Fruit and Vegetables, 5) Bottled water – other	Dr Pepper, Canada Dry, Green Mountain, Snapple, Bai, Mott's	90-100
Kellogg	709	1) Savoury Snacks, 2) Breakfast Cereals, 3) Baked Goods, 4) Sweet Biscuits, Snack Bars, and Fruit Snacks, 5) Processed Meat, Seafood, and Alternatives	Pringles, Pop-Tarts, Kellogg's Eggo, Kellogg's Special K, Kellogg's Frosted Flakes, Morningstar	90-100
Kraft Heinz	1,363	1) Dairy, 2) Processed Meat, Seafood, and Alternatives to Meat, 3) Ready Meals, 4) Sauces, Dressings, and Condiments, 5) Juice	Philadelphia, Oscar Mayer, Heinz, Ore Ida, Kool-Aid	80-90
Mars	1,166	1) Confectionery, 2) Sweet Biscuits, Snack Bars, and Fruit Snacks, 3) Ice Cream, 4) Rice, Pasta, and Noodles, 5) Savoury Snacks	M&M's, Extra/Orbit, KIND, Galaxy/Dove	90-100
Nestlé	398	1) Ready Meals, 2) Dairy, 3) Bottled water – pure, 4) Bottled Water – other, Other hot drinks, 5) Other Hot Drinks	Coffee Mate, DiGiorno, Hot Pockets, Lean Cuisine, Nesquik, Perrier	90-100
PepsiCo	1,671	1) Savoury Snacks, 2) Carbonates, 3) Sport Drinks, 4) Breakfast Cereals, 5) Energy Drinks	Pepsi, Gatorade, Cheetos, Tostitos, Quaker, RockStar	80-90
Unilever	791	1) Ice Cream, 2) RTD Tea, 3) Sauces, Dressings, and Condiments, 4) Ready Meals, 5) Soup	Ben & Jerry's, Breyers, Hellmann's, Lipton, Knorr	90-100

Note: \*Derived from Euromonitor International. ATNI divides the Bottled Water category into two subsets: Pure, which includes Carbonated Bottled Water and Still Bottled Water products; and other, which includes Flavored Bottled Water and Functional Bottled Water products.

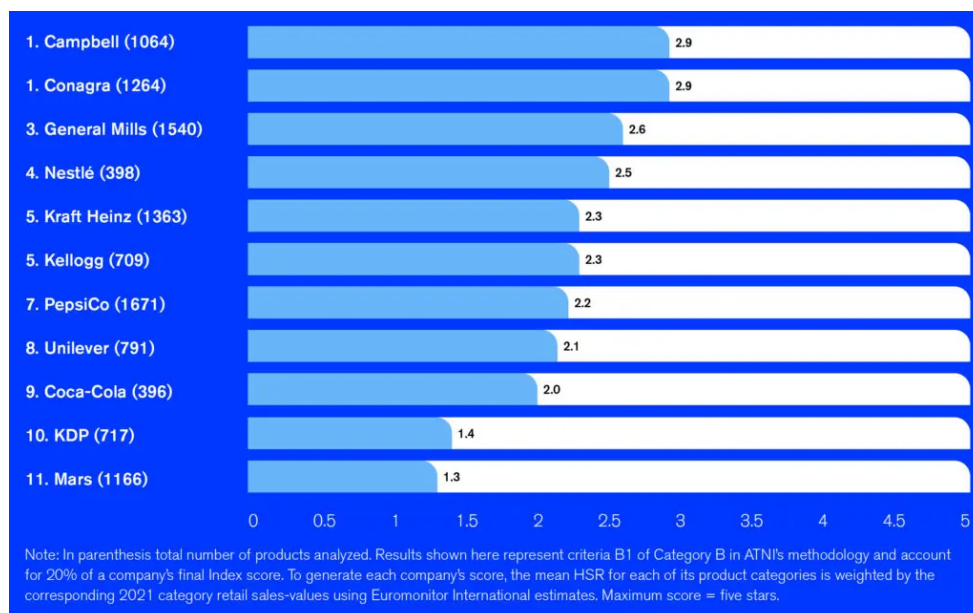
## How healthy are companies' portfolios?

Out of all products analyzed (11,041), 31% met the 'healthy' threshold, (having an HSR of 3.5 or more), corresponding to 29% companies' combined sales in 2021. The average HSR for all companies' products combined was low (2.3 out of 5), with substantial variation observed between companies. Overall, companies with mixed portfolios performed better in the Product Profile, compared to those that derive most sales from less healthy categories – e.g. Mars from Confectionery, and KDP and Coca-Cola from Carbonates.



Conagra and Campbell show the highest scores for the Product Profile, both with a sales-weighted mean HSR of 2.9 out of 5, followed by General Mills (2.6) and Nestlé (2.5). It's important to note that Conagra is active in product categories that score relatively well overall (Processed Fruits and Vegetables, and Ready Meals). Similarly, Campbell is active in the Soup and Sauces, Dressings, and Condiments categories. ATNI estimates that Conagra generated 49% of its 2021 US retail sales from products meeting the 'healthy' threshold – the highest proportion among companies assessed (see Figure 1).

**Figure 1. Sales-weighted mean HSR and ranking**



[Click here](#) to read further into the Product Profile's category-level results.

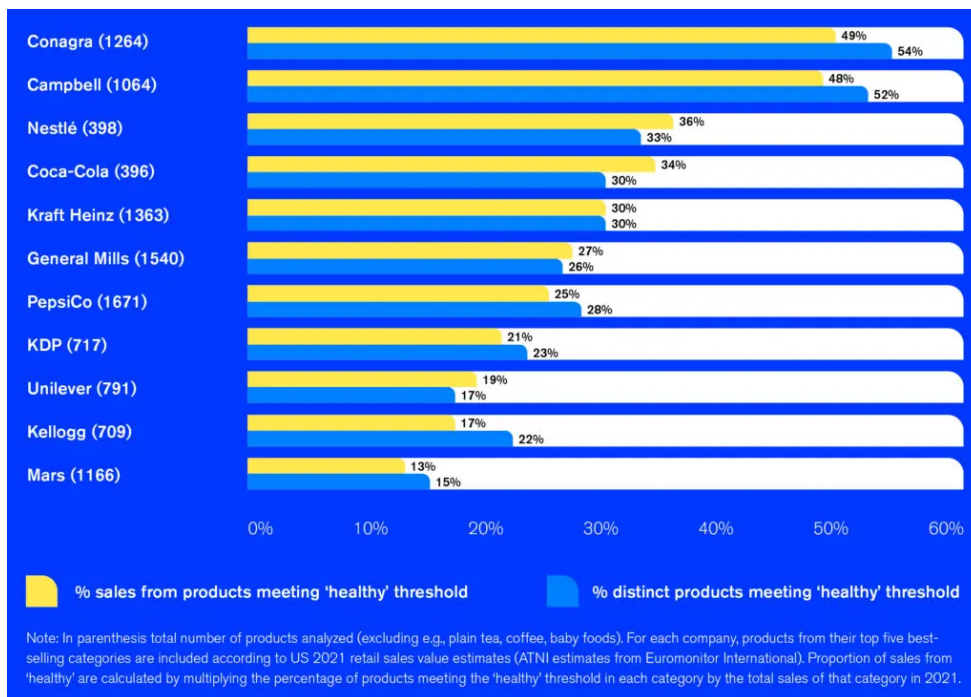
### To what extent do companies generate their US sales from 'healthy' products?

The 'healthy' threshold (having an HSR of 3.5 stars or more out of five) categorizes products into those that could be considered 'healthy' and those that do not meet the threshold.<sup>77</sup> Figure 2 sees only two companies – Conagra and Campbell – had 50% or more of their distinct products meeting the 'healthy' threshold.<sup>78</sup>

In terms of sales, no company was found to derive more than 50% of its sales from healthier products (HSR 3.5 or more). Four companies – Coca-Cola, General Mills, Nestlé, and Unilever – were found to derive a higher proportion of sales from healthier products, compared to the proportion of their distinct products that can be considered healthier, showing it is possible for companies to channel marketing resources to increase sales of healthier foods. Mars was found to have the lowest proportion of 'healthy' products, both before and after sales weighting was applied, due to confectionery items dominating its portfolio and sales.

These findings illustrate the opportunity for companies to increase the proportion of sales derived from healthy foods and decrease their reliance on sales of unhealthy foods. Apart from accelerating product (re)formulation, companies can achieve this by redirecting marketing to healthier products and brands, along with considering nutrition as part of merger & acquisition strategies.

**Figure 2. Percentage of products meeting the 'healthy' threshold and sales from 'healthy' products**



Detailed Product Profile results for each company, including category performance, can be found on the company scorecards. More information on the Product Profile is included in the [TGI report](#).

### How do ATNI's Product Profile results compare?

	US Index 2018	US Index 2022*	Global Index 2021
No. companies assessed	10	11	25
Market share of the combined companies assessed	30-35%	30-35%	20-25%
Mean HSR	2.3	2.3	2.4
% distinct 'healthy' products	30%	31%	31%
% sales from 'healthy' products	22%	29%	27%
No. products analyzed	6,469	11,041	38,176

\*Analysis with the new Health Star Rating (HSR) algorithm

### Recommendations

To improve performance on the Product Profile, companies are encouraged to:

- Give more priority to (re)formulation in their nutrition strategies, to improve the nutritional quality of their products and overall healthiness of portfolios. Companies can also accelerate progress by considering nutrition in their merger & acquisition decisions, e.g. by acquiring healthier brands, and discontinuing or reducing sales of less healthy food & beverage products.
- Re-direct investments toward marketing healthier products or healthier categories to derive more US sales from healthier products.
- Consider the recommendations made in the following sections (related to criteria B2 and B3 of the ATNI methodology).

### **Box 3: What Is Assessed in the Product Profile?**

ATNI compares the healthiness of companies' product portfolios using the Australian HSR. The HSR examines the content of positive nutrients/components (fiber, protein, fruits, nuts, legumes, and vegetables) and nutrients of concern (energy, saturated fats, total sugars, and salt) within individual products (per 100ml or 100g), and assigns them a score between 0.5 and 5.0. ATNI uses the threshold of 3.5 stars or more to classify products as generally healthier.<sup>79</sup>

To select the packaged foods and beverages for analysis, ATNI identified a maximum of five best-selling product categories for each company, based on their estimated US retail sales values in 2021 (). All products in these categories are assessed using the HSR.

The Product Profile assessment is undertaken in partnership with TGI, and follows the same methodology and principles applied according to the previous US Index in 2018.

Nutrient information was obtained either directly from the manufacturer, product packaging, as collated in packaged food & beverage databases, company websites, or in-store visits.

It is important to note that the Product Profile does not include non-nutrient-based measures of nutritional quality or other attributes of packaged foods, e.g. additives and level of processing. In addition, plain tea, plain coffee, baby foods, and other specialty products (e.g. supplements) are excluded from analysis.

For more information on the Product Profile methodology, access TGI's report [here](#).

# B2. Product Formulation

The results of the Product Profile underscore that companies need to increase attention to their commitments to product formulation and innovation, in order to improve the nutritional quality of packaged foods and non-alcoholic beverages in the US.

## Have companies set targets to increase sales of 'healthy' products?

Clear, transparent, and verifiable reporting on targets and progress made to increase sales of healthier products should be a core element of food companies' annual reporting.

**Table 2. Companies' healthy\* sales targets and disclosure**

	% 2021 retail sales of 'healthy' products **	Target to increase sales/proportion of healthy products	Annual reporting of healthy sales	Target linked to external NPM or definition of healthy	US-specific compliance disclosed	Source
Campbell	48%	–	69% of products meet Nutrition Guidelines for Product Development, representing 65% of sales in 2021	–	–	2022 Corporate Responsibility Report <sup>1</sup>
Conagra	49%	–	Revenue from products labeled and/or marketed to promote health and nutrition attributes is approximately \$9.7billion	–	–	2021 Corporate Social Responsibility
Coca-Cola***	34%	–	Low- or no-calorie sales volumes were 28.2% of portfolio in 2020.	–	–	2020 Business and ESG Report <sup>2</sup>
General Mills	27%	–	47% of General Mills' US volume met the Nutrition-Forward criteria in 2021	–	Yes	Global Health Reporting <sup>3</sup>
Kellogg	17%	–	% Foods meeting Kellogg Global Nutrition Criteria (KGNC) by category	–	–	US Wellbeing Policies and Milestones <sup>4</sup>
KDP	21%	Provide positive hydration in 60% of KDP products by 2025	54% of KDP's portfolio provided positive hydration in 2020	–	Yes	2020 Corporate Responsibility Report <sup>5</sup>
Kraft Heinz	30%	85% of products by sales weighted volume to be compliant with Global Nutrition Targets (GNTs) by 2025	Compliance with GNTs 74.7% in 2020	–	–	2021 ESG Report <sup>6</sup>
Unilever	19%	70% of global portfolio to meet Unilever's highest nutritional standards (HNS) standards by 2022	64% of US portfolio meets Unilever's highest nutritional standards (HNS) in 2021	– ***	Yes	Sustainability performance data <sup>7</sup>

– No/no target

<sup>1</sup> Campbell (2022). 'Delivering on our Purpose' 2022 Corporate Responsibility Report. Available from: <https://campbellsoupcompany.com/wp-content/uploads/2022/03/2022-Corporate-Responsibility-Report.pdf>

<sup>2</sup> Coca-Cola (2020). Business and ESG Report 2020. Available from: <https://d1j03yog0oux5.cloudfront.net/cocacola.com/files/pages/cocacola.com/db/761/description/coca-cola-business-environmental-social-governance-report-2020+%282%29.pdf>

<sup>3</sup> General Mills (n.d). Global Health Reporting Bell Institute of Health & Nutrition. General Mills. Available <https://www.bellinstitute.com/about-us>

<sup>4</sup> Kellogg (2022). U.S. Wellbeing Policies and Milestones. Available from: [https://filecache.mediaroom.com/mf5mr\\_kellogs\\_cr/181036/KelloggCompany\\_USWellbeingPolMilestones\\_March2022.pdf](https://filecache.mediaroom.com/mf5mr_kellogs_cr/181036/KelloggCompany_USWellbeingPolMilestones_March2022.pdf)

<sup>5</sup> Keurig Dr Pepper (2020). Corporate Responsibility Report. Available from: <https://www.keurigdrpepper.com/content/dam/keurig-brand-sites/kdp/files/KDP-CR-Report-2020.pdf>

<sup>6</sup> Kraft Heinz (2021). 'Stepping Up to the Plate' The Kraft Heinz Company 2021 ESG Report. Available <https://www.kraftheinzcompany.com/esg/pdf/KraftHeinz-2021-ESG-Report.pdf>

<sup>7</sup> Unilever. (n.d). Sustainability performance data. Society 'Nutrition targets (XLSX 515KB)'. Available at: <https://www.unilever.com/planet-and-society/sustainability-reporting-centre/sustainability-performance-data/>.

\* According to company's definition of 'healthy'.

\*\* HSR >= 3.5, according to ATNI's Product Profile results

\*\*\* Coca-Cola does not have an internal definition of 'healthy', but tracks its low- and no-calories portfolio sales in alignment with the Sustainability Accounting Standards Board (SASB) disclosure framework.

\*\*\*\* In March 2022, Unilever announced its plans to benchmark its portfolio against at least six different NPMs, as well as its own Highest Nutritional Standards.

Only three companies – Keurig Dr Pepper, Kraft Heinz, and Unilever – were found to have set clear and time-bound targets to increase the sales/proportion of 'healthy' products globally, including in their US portfolios (see Table 2). Unilever and Kraft Heinz indicate their targets are linked to sales volumes. It is important to note that the three companies use their own definitions of 'healthy' (set of nutrition criteria or NPM). Keurig Dr Pepper works with Partnership for Healthier America (PHA) to independently verify progress against its goal.<sup>80</sup>

**Notable Example:** Unilever is the only company that externally verifies its target to improve sales of healthier products. The company has appointed PricewaterhouseCoopers (PwC) to provide limited assurance of selected sustainability metrics. This is a notable development, as stakeholders are increasingly looking for accurate and reliable public metrics on nutrition. In 2021, 63% of Unilever's global portfolio by sales volume was found to have met the company's Highest Nutrition Standards (HNS) NPM.<sup>81</sup> In addition, the company reports US-specific compliance (at 64% in 2021) on its global website under 'Sustainability Performance Data.'<sup>82</sup> In March 2022, the company announced that, as of 2023, it will publicly report the performance of its product portfolio against at least six different government-endorsed NPMs as well as its own HNS.<sup>83</sup>

Mars commits to 95% (or more) of its products meeting its nutrition criteria by 2025. However, this target only covers the company's food segment, excluding Mars Wrigley products, which account for most of the company's sales.<sup>84</sup> In addition, no US-specific target or reporting was found.

As Table 2 shows, only two companies – General Mills and Unilever – disclose the proportion of 'healthy' sales for their US portfolio.

### Do companies publicly state whether their approach to (re)formulating products is aligned with the Dietary Guidelines for Americans, 2020–2025?

While many companies reference international and national dietary guidelines as part of their nutrition strategies, results show that five companies (Kellogg, KDP, Mars, PepsiCo, and Unilever) made explicit references to the latest edition of the US Dietary Guidelines for Americans, 2020–2025 and/or the recommendations that target US-specific nutrition concerns. Companies refer to these guidelines either on their websites, in nutrition strategies, or NPMs. For example, in the Mars Food Nutrition Criteria, the company defines a single serving of wholegrains as 16g dry making reference to the Dietary Guidelines for Americans, 2020–2025 and the Health Grain Forum.<sup>85</sup>

### To what extent have companies adopted SMART product (re)formulation targets?

**Table 3. Overview of product (re)formulation targets**

	Campbell	Coca-Cola	Conagra	General Mills	Kellogg	KDP	Kraft Heinz	Mars	Nestlé	PepsiCo	Unilever
Salt/sodium	-	n/a	-	●	●	n/a	●	●	●	●	●
Saturated fat	-	n/a	-	-	●	n/a	●	●	●	●	●
Added sugar	-	●	-	-	●	●	●	●	●	●	●
Fruits, vegetables, nuts, and legumes	-	-	-	-	-	●	-	●	-	-	●
Wholegrains	-	n/a	-	-	-	n/a	-	●	-	-	●

● Target covers all relevant products  
 ● Target is either not fully specified and/or does not cover all relevant products  
 n/a Target is not applicable to company based on products  
 - No target/no information

Note: Depending on the company portfolio, selected targets were considered not applicable. For example, a target to reduce saturated fat in carbonated drinks is not applicable, as these products do not contain saturated fat.

Overall, Index results show that companies continue to adopt company-specific targets, without specifically referring to externally verifiable benchmarks or standards – which limits the ability to compare progress over time. ATNI encourages companies to review their targets in alignment with external benchmarks to ensure that reductions of nutrients of concern and higher amounts of positive nutrients and ingredients result in meaningful public health impact. Table 3 shows that most companies have targets in place to reduce nutrients of concern (e.g. sodium, saturated fat, added sugar), but only a few have targets to increase positive nutrients or ingredients (e.g. fruits, vegetables, nuts and legumes, and wholegrains). For sodium and added sugars, most companies were found to have targets in place. Campbell and Conagra are the only companies found to have no nutrient or food component-specific (re)formulation targets.

### *Sodium*

- PepsiCo and Unilever are the only companies to adopt a sodium target that is aligned with FDA guidance for all relevant categories in their portfolios.
- As part of its new Compass strategy, Unilever has defined the ambition to have 85% of its food portfolio “help consumers reduce their salt intake to no more than 5g per day by 2022.” However, this target is not easy to verify externally, and it’s unclear how acceptable sodium levels link to the company’s HNS. On its global website, under ‘Sustainability performance data,’ Unilever publishes progress by country. For the US, 87% of its portfolio was reported to have met the salt target in 2020 (up from 83% in 2019).
- One company was found to be currently undertaking an internal evaluation on how its best-selling products across all relevant categories in the US portfolio perform against the voluntary FDA sodium standards.
- In 2021, PepsiCo announced its new sustainability strategy, Pep+, which includes a commitment to accelerating its reduction of added sugars and sodium through the use of science-based targets across its portfolio, and cooking its food offerings with healthier oils.<sup>86</sup> The company has the ambition for at least 75% of its foods portfolio volume not to exceed 1.3mg of sodium per calorie by 2025. However, the company did not disclose compliance against this target for the US market.

### *Saturated fat*

- Only three companies – Unilever, Kraft Heinz, and PepsiCo – were found to have saturated fat reduction targets in place that are applicable to all relevant products in their portfolios. Only PepsiCo has a specific saturated fat target that is time-bound (by 2025, at least three-quarters of its global foods portfolio sales volume will not exceed 1.1g of saturated fat per 100 calories). PepsiCo works together with Partnership for Healthier America (PHA) to serve as an independent verifier of its commitments to reduce added sugar in the beverage portfolio, along with sodium and saturated fats in its foods portfolio.<sup>87</sup>
- Mars and Kellogg commit to reducing saturated fat levels. However, their commitments do not extend to all relevant products. For example, Kellogg commits to saturated fat levels of less than 5g per 100g by 2025. However, the company limits this commitment, covering only its foods marketed to children. Mars has relevant saturated fat criteria, but this is only applicable to its food segment.
- In its 2020 Creating Shared Value report, Nestlé states that its target to reduce saturated fat by 10% in all relevant products that do not meet the Nestlé Nutritional Foundation (NF) criteria with respect to saturated fat has been achieved. However, no new target for saturated fat was reported.

### *Sugar*

- Mars, Kraft Heinz and Unilever are the only companies that have adopted sugar target(s) for all relevant product categories.
- Mars Food Nutrition Criteria, third edition, 2021, states that, by 2025, 95% of its products will meet strict nutrition standards for energy, sodium, added sugar, saturated, and total fat. Mars Wrigley has committed, in alignment with PHA, to using ≤25g sugar/portion as its guidepost for all new products, beginning with innovation in 2020 for chocolate and 2023 for fruity confections.

- Of the three beverage companies that started the Beverage Calories Initiative (BCI, see Box 5) in 2014, PepsiCo is the only company found to disclose, on its own website, a company-specific commitment to reducing calories from added sugars in its global portfolio, including the US. By 2025, the company wants 67% or more of its beverage portfolio volume to have 100 calories or less from added sugars per 12oz serving. According to PepsiCo, by the end of 2020, 48% of its beverage sales volume in its top 26 global markets was in line with this goal. To improve transparency, companies that are part of the BCI are encouraged to disclose company-specific progress on their calorie reduction programs and publish updated data on their own websites.

#### *Positive Nutrients and Ingredients*

- Only three out of the 11 companies assessed – KDP, Mars, and Unilever – were found to have a target in place to increase the levels of fruits, vegetables, nuts, or legumes in their products. In the US Index 2018, only one company was found to have a positive nutrients/ingredients target. In 2022, Unilever disclosed a relevant target for all product categories. As part of its new Compass Future Foods commitments, Unilever strives to double the number of products sold that deliver ‘Positive Nutrition.’ The company defines this as products containing impactful amounts of vegetables, fruits, proteins, fiber, unsaturated fatty acids, or micronutrients such as vitamins, zinc, iron, and iodine.<sup>88</sup>
- Unilever and Mars disclosed a target to increase levels of wholegrains. In its updated Food Nutrition Criteria, Mars states: “At the start of 2021, we set ourselves a new challenge of delivering 5.5 billion healthy meals by 2025. We will do this through delivering 4 billion servings of vegetables, a 30% increase of fiber servings in our products, and a 5% reduction of sodium in our portfolio by 2025.” As part of its association with PHA, Mars has committed to expanding wholegrain options in the US, so that at least half of all grain products in the Mars US Food product portfolio include a minimum of 16g of wholegrains per serving and may include legumes.<sup>89</sup>
- Other companies have general commitments to increasing the use of positive nutrients or ingredients, but did not specify a time-bound target. For example, PepsiCo’s Pep+ strategy explicitly states that the company will use more legumes, wholegrains, plant-based proteins, fruits and vegetables, nuts and seeds, and diverse ingredients.

#### **To what extent have companies invested in products with smaller packaging sizes or serving sizes? (unscored indicator, for information only)**

Evidence as to the impact of portion control on the part of consumers and smaller packaging sizes on public health remains limited. Therefore, this is an unscored indicator in ATNI’s methodology (i.e. for information purposes only). Many companies offer smaller serving sizes and a variety of packaging options. Little evidence was found of companies adopting comprehensive programs or conducting research to explore how these efforts have led to improved consumer portion control in the US. Recognizing the need to support education campaigns and market research, a few of the Index companies support the multi-stakeholder platform Portion Balance Coalition. More information about this initiative can be found in [Chapter G on Lobbying](#).

In the last three years, eight companies were found to be developing products with smaller packaging or serving sizes across multiple categories or brands. Examples vary from mini-cans of carbonated drinks to smaller portions of single-serve snacks. Two companies provided relevant examples, but only across one product category (e.g. confectionery) or for one brand.

#### **Recommendations**

To improve the healthiness of their portfolios, companies are encouraged to:

- Evaluate the overall healthiness of their US product portfolios according to ATNI's methodology. And define concrete and time-bound targets to increase sales of 'healthy' products. Companies are recommended to report progress on delivering against their 'healthy' sales target on an annual basis, and to make this information easily accessible on the company's US-specific website or in reports. ATNI encourages companies to couple financial growth targets with higher sales of healthier products.
- Set targets to reduce nutrients of concern and increase positive nutrients/ingredients in their products. Targets should apply to the entire US product portfolio (where relevant), and companies report on progress over time. Targets should be aligned with national recommendations or standards (e.g. FDA voluntary sodium reduction targets) and, when those are not available, to international standards (e.g. WHO).
- Demonstrate that new product development and product reformulation efforts are aligned with the Dietary Guidelines for Americans, 2020–2025.
- Ensure that all products sold under the Smart Snacks in School regulation and their identical counterparts sold in retail meet the same nutrition standards.

#### **Box 4: Smart snacks in school**

The US Department of Agriculture's (USDA) Smart Snacks in School standard is a federal standard that applies to all snacks and beverages sold, in school stores, vending machines, and other venues where food is sold to students. Nutrition experts have raised concerns that, while products supplied to schools meet the Smart Snacks in School nutrition standard, equivalent and identical products with the same look and feel, sold in retail and other outlets, might not.<sup>90</sup> Such products are referred to as 'copycat' or 'lookalike' products.

The US Index in 2018 found that only two companies provided evidence of formulating all products in the Smart Snacks program in the same way, irrespective of the distribution channel. In 2022, six companies stated that either they don't participate in the program (Unilever, Conagra, and Nestlé), or they already formulate all products in the same way (Coca-Cola, Kellogg, and PepsiCo). Kellogg is the only company that makes a public and specific reference to this topic in its US Wellbeing Policies and Milestones 2022 report, stating: "In 2021, 16% of our K-12 Smart Snack portfolio was sold in other sectors of away-from-home channels. Any of our foods that deliver against Smart Snacks standards are also sold outside of schools in channels such as vending and retail."<sup>91</sup>

#### **Box 5: Beverage Calories Initiative**

To help fight obesity, in 2014, companies in the American Beverage Association – Coca-Cola, KDP, and PepsiCo – together with the Alliance for a Healthier Generation, agreed to a multi-year effort to reduce beverage calories consumed per person nationally by 20% by 2025. Named BCI, according to the latest evaluation of the program, calories per person have decreased 10% since its launch.<sup>92</sup>



# B3. Nutrient Profiling Model (NPM): Defining 'Healthy' Products

How many companies have adopted an NPM, and are they externally validated?

All companies (as shown in table 4) except Coca-Cola have adopted an NPM or other nutrition criteria to guide their product (re)formulation strategies.

Table 4. Characteristics of companies' nutrition criteria, NPMs

	Uses NPM or other nutrition criteria	NPM generates scores that rank healthiness of foods	Own NPM / criteria or external model*	Criteria is category-specific or applies across the board*	Both positive nutrients / ingredients and nutrients of concern	Benchmarked against external models	Reference
Campbell	●	-	Own	Across the board	Positive and negative	-	Nutrition Focused Foods and Reducing Negative Nutrients: Guidelines for Product Development <sup>1</sup>
Coca-Cola	-	-	-	-	-	-	-
Conagra	●	●	External-Nutri-Score	Category-specific	Positive and negative	Nutri-Score/ FDA healthy	Citizenship Report 2021 <sup>2</sup>
General Mills	●	-	Own/FDA healthy	Across the board	Positive and negative	FDA healthy	Nutrition- Forward Foods, Global Health Reporting <sup>3</sup>
KDP	●	-	Own	Across the board	Positive and negative	-	Positive hydration-2020 Corporate Responsibility Report <sup>4</sup>
Kellogg	●	-	Own	Category-specific	Positive and negative	-	Kellogg Global Nutrition Criteria <sup>5</sup>
Kraft Heinz	●	-	Own	Category-specific	Negative only	-	Global Nutrition Guidelines <sup>6</sup>
Mars	●	-	Own	Category-specific	Positive and negative	Only for sodium	Food Nutrition Criteria -Third Edition <sup>7</sup>
Nestlé	●	-	Own	Category-specific	Positive and negative	-	Nestlé Nutrient Profiling System
PepsiCo	●	●	Own	Category-specific	Positive and negative	For some nutrients	PepsiCo's Nutrition Criteria <sup>8</sup>
Unilever	●	-	Own	Category-specific	Positive and negative	- **	Unilever Nutrition Standards <sup>10</sup>

● Yes  
- No/no information

<sup>1</sup> Campbell's. (2022). Nutrition focused foods. Available at: [https://www.campbellsoupcompany.com/wp-content/uploads/2022/03/Nutrition-Reporting-Metrics-Criteria\\_Nutrition-Focused-Foods.pdf](https://www.campbellsoupcompany.com/wp-content/uploads/2022/03/Nutrition-Reporting-Metrics-Criteria_Nutrition-Focused-Foods.pdf). Reducing Negative Nutrients: Guidelines for Product Development Available at: [https://www.campbellsoupcompany.com/wp-content/uploads/2022/03/Reducing-Negative-Nutrients\\_Guidelines-for-Product-Development.pdf](https://www.campbellsoupcompany.com/wp-content/uploads/2022/03/Reducing-Negative-Nutrients_Guidelines-for-Product-Development.pdf) (Accessed: 10/06/2022).

<sup>2</sup> Conagra. (2021). Conagra brands citizenship report (pg 10). Available at: <https://www.conagrabrands.com/citizenship-reports/conagra-brands-citizenship-report-2021>. (Accessed: 10/06/2022).

<sup>3</sup> Bell Institute of Health & Nutrition. (n.d). About us. Available at: <https://www.bellinstitute.com/about-us>. (Accessed: 10/06/2022).

<sup>4</sup> Keurig Dr Pepper. (2020). Corporate responsibility (pg 28). Available at: <https://www.keurigdrpepper.com/en/our-company/corporate-responsibility>. (Accessed: 10/06/2022).

<sup>5</sup> Kellogg's. (n.d). Positions, policies and milestones. Available at: <https://crreport.kelloggcompany.com/ppm>. (Accessed: 10/06/2022).

<sup>6</sup> Kraft Heinz. (2020). Global nutrition guidelines. Available at: <https://www.kraftheinzcompany.com/pdf/Kraft-Heinz-Global-Nutrition-Guidelines.pdf>. (Accessed: 10/06/2022).

<sup>7</sup> Mars Food. (2021). Mars Food Nutrition Criteria. Third Edition, August 2021. Available at: <https://www.mars.com/sites/g/files/jydpjr316/files/2021-08/FINAL%20Mars%20Food%20Nutrition%20Criteria%203E.pdf>. (Accessed: 10/06/2022).

<sup>8</sup> Nestlé. (n.d). The Nestlé nutritional profiling system, its product categories and sets of criteria. Available at: [https://www.nestle.com/sites/default/files/asset-library/documents/library/documents/nutrition\\_health\\_wellness/nestle-nutritional-profiling-system.pdf](https://www.nestle.com/sites/default/files/asset-library/documents/library/documents/nutrition_health_wellness/nestle-nutritional-profiling-system.pdf). (Accessed: 10/06/2022).

<sup>9</sup> [https://www.pepsico.com/docs/album/esg-topics-policies/pepsico-nutrition-criteria.pdf?sfvrsn=d39f134b\\_6](https://www.pepsico.com/docs/album/esg-topics-policies/pepsico-nutrition-criteria.pdf?sfvrsn=d39f134b_6)

<sup>10</sup> Unilever. (n.d). Unilever nutrition standards. Available at: <https://assets.unilever.com/files/92ui5egz/production/c60e27dd23683543f7966a3fb3c6d40af5af6972.pdf/unilever-nutrition-standards-booklet.pdf>. (Accessed: 10/06/2022).

Notes: \*Unscored element in the Index. \*\*In March 2022, the company announced that, as of 2023, it will publicly report the performance of its product portfolio against at least six different government-endorsed NPMs, as well as its own HNS.

In addition, these criteria can be used to evaluate the healthiness of entire portfolios. This is critical, as more transparency and demand for setting healthy targets arise. Table 4 also shows that most companies have category-specific NPMs, which means nutrient or ingredients thresholds vary by product type.

Another positive development is that most companies are considering both positive nutrients and ingredients in their models, as well as nutrients of concern. In 2018, only four companies were found to do so (General Mills, Mars, Nestlé, and PepsiCo).

It is important to note that the assessment of companies' NPMs is based on the design principles, not on an in-depth assessment of the nutrition criteria embedded within them.

**Notable Example:** In its 2021 Citizenship report, Conagra describes the introduction of a new metric, 'Sustainable Nutrition,' as measured by NutriScore A or B for vegan and vegetarian products. According to the company, 82% of its vegan and vegetarian meals and meat replacements currently qualify for this attribute. In addition, the company applies the FDA Healthy criteria to its Healthy Choice products. However, as the company does not formally publish how it uses these NPMs (FDA/Nutri-Score), it is unclear as to which products in Conagra's US portfolio are revised or developed considering these criteria.

#### **To what extent do companies publicly disclose information about their NPMs?**

Despite important developments in the adoption of NPMs, only a few companies publish full details on the use of their NPMs. Nestlé, PepsiCo, and Unilever publish details of their NPMs in peer-reviewed journals. Conagra also uses a validated and government-endorsed NPM, Nutri-Score.

So far, no company has publicly disclosed the results of applying their own criteria/NPM against the results of applying an internationally recognized NPM to their portfolio.

While ATNI welcomes the development and application of evidence-based NPMs to guide companies' (re)formulation strategies, varied definitions of 'healthy' products and other criteria are being used, which limits efforts by external stakeholders to monitor and compare companies' progress over time.

**Notable Example:** PepsiCo published its NPM in a peer-reviewed journal article.<sup>93</sup> The article presents PepsiCo Nutrition Criteria (PNC), a new internal NPM that was designed to guide and monitor improvements in nutrient density and overall nutritional quality of foods and beverages. The new PNC NPM assigns food products into four classes of increasing nutritional value, based on the content of nutrients to limit, along with nutrients and ingredients to encourage. The nutrient standards used for category assignment follow those developed by global dietary authorities. Standards are proposed for calories, sodium, added sugars, saturated, and industrially produced trans fats. In the article, the company provides examples of recently reformulated products according to these guidelines.

In March 2022, Unilever announced that, as of 2023, it would publicly report the performance of its product portfolio against at least six different government-endorsed NPMs, as well as its own HNS.

Apart from using company-specific NPMs, there is evidence that some manufacturers might make use of existing government programs' nutrition criteria to develop healthier products. For example, Campbell reports that 71% of Campbell Soup's meals and beverages meet the requirements for at least one federal nutrition program, including WIC Eligible Foods, SNAP Staple Foods for Retailer Eligibility and USDA Smart Snacks.<sup>94</sup> More transparency on how companies use different nutrition criteria for their product (re)formulation strategies is required.

## **Recommendations**

To increase the sales from healthier products and accelerate product (re)formulation strategies, companies are encouraged to:

- Benchmark their definition of 'healthy' and/or full NPMs against externally validated and preferably internationally recognized (and, where applicable, government-endorsed) – like the planned FDA standard<sup>95</sup> on the criteria to use the term 'healthy' as a nutrient content claim. This is critical to ensuring companies' (re)formulation strategies focus on the overall nutritional quality of products rather than on individual nutrients, and that they align with public health priorities and recommendations set out by the Dietary Guidelines for Americans, 2020–2025. To support this, all companies are recommended to consider reviewing how the Product Profile results compare to their own estimates.
- Disclose full details of their NPM on their websites, including scores, criteria, and how and for what purposes the criteria are applied. If companies have developed their own NPM, this should be evidence-based and preferably published in a peer-reviewed scientific journal.
- Ensure the NPM covers the entire product portfolio and conduct regular evaluations to ensure the criteria used are aligned with the most updated scientific evidence and available standards, e.g. to the FDA voluntary sodium reduction guidelines.

### **Box 6: Methodology - healthy multiplier results**

In the US Index 2022 methodology, a healthy multiplier is applied to any scores for commitment, performance or disclosure indicators relating to 'healthy' products. The multiplier is derived from the company's score on Criterion B3: 'Nutrient Profiling Model (NPM): defining 'healthy' products, and ranges from 0.4 (i.e., reducing the score of a relevant indicator) to 1 (i.e., no effect on the score of a relevant indicator).<sup>96</sup>

Companies' 'healthy' multiplier results:

- 1.0 (PepsiCo)
- 0.8 (Conagra, General Mills, Nestlé and Unilever)
- 0.6 (Campbell, Kellogg, KDP, Mars, Kraft Heinz)
- 0.4 (Coca-Cola)

PepsiCo is the only company that achieves a score of 8 points or more (out of 10) in criterion B3, thereby receiving a healthy multiplier of 1.0. This is linked to the fact that the company's NPM – PepsiCo Nutrition Criteria – was designed to be inclusive of its whole portfolio, includes both nutrients of concern and positive nutrients, and consist of a scoring system which allows foods to be ranked or classified based on their healthiness. For other companies with no NPMs (Coca-Cola) or less comprehensive models and lack of transparency, a healthy multiplier is applied impacting indicators in the methodology that refer to 'healthy' products.

The 'healthy' multiplier results for the US Index might differ from the Global Index 2021 due changes in methodology and different thresholds used to derive the multiplier.



# Accessibility and Affordability

## Delivering Affordable, Accessible Products

**For healthy products to have meaningful impact when it comes to addressing public health challenges, they must be both affordable and accessible for all consumers, to both encourage and enable a shift in diets toward healthier diets. Moreover, since obesity rates in the US are disproportionately higher among low-income groups and those residing in areas with relatively low access to supermarkets and convenience stores, companies must ensure their healthy products are priced appropriately and adequately distributed.**

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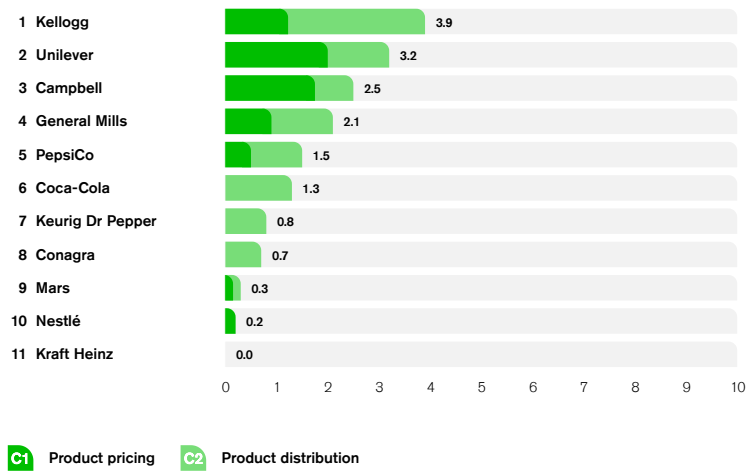
### **Category C consists of two criteria:**

- C1 Product Pricing
- C2 Product Distribution

### **To perform well in this category, companies should:**

- Make clear, formalized commitments that extend to a clear strategy, with Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART) targets to promote the affordability of their healthier products (according to the company's definition) over less healthy products, and with low-income consumers in mind.
- Provide evidence of conducting pricing analyses to appropriately price healthy products and of improving the price differential between 'healthy' vs. less 'healthy' products.
- Disclose commitments, targets and a strategy to improve affordability of 'healthy' products.
- Make clear, formalized commitments that extend to a clear strategy, with Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART) targets to promote the accessibility of their healthier products (according to the company's definition) over less healthy products, and with food-insecure groups in mind.
- Take steps to improve the accessibility of 'healthy' products for low-income/food-insecure households, such as seeking arrangements with retailers and distributors to ensure the distribution and availability of healthy products nationwide.
- Have a policy in place to ensure responsible food donations, with clear prioritization of healthy products, and show evidence that the vast majority of their food donations are healthy.
- Disclose commitments, targets, and a strategy to improve access to 'healthy' products.

# Ranking



Overall, there was slight improvement in Category C, but overall scores remain low, averaging at 1.5, and the highest score remains under 4. Kellogg continues to score the highest in this category, with commitments and actions in place for both affordability and, especially, the accessibility of products it defines as healthy. Unilever demonstrates the greatest improvement, having developed new affordability strategies for one its healthier brands in the US, scoring 3.2 (a sizeable increase from 0.1 in 2018).

# Category Context

## Affordability

According to the American Heart Association (AHA), 'affordability' means that nutritious foods are available at a cost that is accessible to all individuals, including those on low incomes.<sup>97</sup> The current climate of rising inflation, which reached the highest rate in 40 years in the US in April 2022, accentuates the urgency of addressing the affordability of healthy foods relative to unhealthy foods. With low-income households spending an average of 30% of their income on food (compared to 10% for the average American household), as costs of living soar, price considerations inevitably supersede nutrition quality as a priority for millions of Americans.<sup>98</sup> Given that less healthy foods are typically cheaper than healthy options,<sup>99</sup> the cost-of-living crisis could further exacerbate the obesity epidemic.<sup>100</sup> Numerous studies have found a strong correlation between food insecurity and obesity in the US.<sup>101</sup> Therefore, food & beverage manufacturers can make a real difference by offering a wide range of nutritious products at affordable prices at a greater rate than less healthy products.

## Accessibility

For this report, 'accessibility' means that nutritious foods are readily obtainable by individuals in all geographic locations. According to the latest Dietary Guidelines for Americans, access is "influenced by diverse factors, such as proximity to food retail outlets (e.g., the number and types of stores in an area), ability to prepare one's own meals or eat independently, and the availability of personal or public transportation. The underlying socioeconomic characteristics of a neighborhood also may influence an individual's ability to access foods to support healthy eating patterns."<sup>102</sup>

The US Department of Agriculture's (USDA) 2017 study on food access found that 39m people (12%) in the US live in low-access communities – where at least a third of the population lives over a mile from a supermarket or large grocery store (in urban areas), or more than ten miles away (in rural areas).<sup>103</sup> These are associated with low access to affordable fruits, vegetables, wholegrains, low-fat milk, and other foods that make up a healthy diet. One study has also found a positive association between living in low-access communities and obesity.<sup>104</sup>

## Federal Assistance Programs

While the US has extensive federal assistance programs that provide a safety net to addressing basic food security (see Box 1), food manufacturers, apart from providing the food and beverage products for these programs, still have a significant responsibility to advance nutrition security through their own commercial operations. As SNAP has no restrictions on monthly benefits being spent on unhealthy products, if these remain cheaper and/or more accessible, low-income consumers may continue to prioritize them to meet their basic needs.<sup>105</sup> By providing their healthy products at lower prices and ensuring adequate distribution in low-income areas, companies can encourage participants, as well as the general consumer, to choose healthier foods. Moreover, given that many households that are food-insecure are either ineligible for either SNAP or WIC or do not participate (for a variety of reasons), addressing the affordability of healthy products in general is still highly relevant.

The US Government in the September 2022 National Strategy on Hunger, Nutrition and Health announced actions to further increase access to free and nourishing school meals; providing Summer Electronic Benefits Transfer (EBT) benefits to more children; and to expand the Supplemental Nutrition Assistance Program (SNAP) eligibility to more underserved populations.

## The Charitable Food System

The charitable food system and food banking are other major means by which food access and affordability are addressed in the US for low-income consumers: 6.7% of all US households reported using a food pantry in 2020, up from 4.4% pre-pandemic.<sup>106</sup> Over the last decade, the food & beverage industry has contributed vast sums – both in cash and in-kind – to food banking organizations and networks as part of their philanthropy efforts, especially during the COVID-19 pandemic.<sup>107</sup>

However, donations of unhealthy products have been cause for alarm for stakeholders over the last decade (including during the pandemic), as these can exacerbate poor nutrition issues.<sup>108</sup> For example, a 2018 report found that one-quarter of food distributed through food banks consisted of unhealthy beverages and snack foods – and while more than half of food banks track the nutritional quality of donations and/or have nutritional guidelines, nearly 40% face difficulties in knowing how to handle unwanted food & beverage donations.<sup>109</sup>

Therefore, it is essential that companies, as a minimum, have policies to limit the amount of less healthy foods donated and that they, ideally, provide predominantly healthy products to improve the diets and health of people dependent on food banks. To this end, in 2020 Healthy Eating Research (HER) developed nutrition guidelines for charitable food systems, which were adopted by Feeding America.<sup>110</sup> Most importantly, however: companies need to make efforts to remove some of the systemic barriers to the consumption of healthy products by addressing affordability and accessibility in their commercial operations.

### Box 1. US Federal Assistance Programs: SNAP and WIC

The US has several federal assistance programs to combat food insecurity among low-income consumers, such as the Supplemental Nutrition Assistance Program (SNAP) and Special Supplemental Nutrition Program for Women, Infants, and Children (WIC). SNAP benefits are currently claimed by 41.5m people, increasing by 17% between February 2020 and April 2021. Recipients receive a monthly benefit that can be used to buy food and non-alcoholic beverages in many retailers and convenience stores (restaurants are excluded). In August 2021, this monthly benefit per person was increased by 25%, to an average of USD 161, to reflect the cost of a healthy diet as defined by the revised 'Thrifty Food Plan.' Much of this money is spent on products manufactured by companies assessed in this Index.

However, there is no requirement to spend the benefit on nutritious food. For example, a 2016 study found that sweetened beverages were the second-most-purchased item on SNAP benefits, accounting for slightly more than 9% of purchases, while prepared desserts made up 7% of purchases.<sup>111</sup> Moreover, despite the rising number of recipients, many food-insecure households struggle to navigate administrative burdens or lack awareness of eligibility.<sup>112</sup>

The WIC program meanwhile, has a focus on nutrition. The WIC food packages provide supplemental foods designed to meet the special nutritional needs of low-income pregnant, breastfeeding, non-breastfeeding postpartum women, infants and children up to five years of age who are at nutritional risk.<sup>113</sup> Many companies in this Index manufacture such foods. As of 2021, WIC serves 6.2m women and children.<sup>114</sup> However, participation rates in WIC have been declining, largely due to increased barriers for those who would otherwise be eligible, especially during the pandemic, rather than decreasing need.

According to a 2021 study, 21% of US adults experiencing food insecurity were unable to access any assistance at all, while 58% that were enrolled still had difficulty accessing at least one service.<sup>115</sup> The 2022 National Strategy on Hunger, Nutrition and Health announced it will make it easier for eligible individuals to access federal food, human services, and health assistance programs such as SNAP, WIC, and Medicaid.<sup>116</sup>

# Changes to the Methodology

- A further shift in focus to commercial approaches for affordability and accessibility, and greater emphasis on improving the price differential between healthy vs. less healthy products.
- For non-commercial activities focused on food donations, greater emphasis is placed on ensuring that these are made responsibly, i.e. being predominantly healthy products.



# Key Findings

- The majority of companies assessed did not show evidence of specifically addressing either the affordability or accessibility of their healthy products in a meaningful way through commercial channels. For those with some form of access and affordability strategy in place, insufficient attention is paid to low-income or food-insecure consumers. No company has such strategies in place across its whole business in the US; actions are confined to specific product lines or brands.
- However, there are some signs of improvement. Unilever, General Mills, Kellogg, and PepsiCo show they have taken concrete actions to improve the affordability of some of their 'healthy' products in the US – more than was the case in 2018. Meanwhile, Unilever, through its Knorr brand, specifically seeks to price some of its 'healthy' products appropriately for low-income households, which is a first for this Index.
- Another first is provided by Campbell, which has started to track the pricing of its products that meet its healthiness criteria against the rest of its portfolio, while also publishing the price differential.
- Significantly more companies are now publicly committing to addressing the accessibility of healthy products in the US than in 2018. However, the predominant way continues to be through charitable donations – instead of taking a systemic commercial approach to ensure healthier products are widely available at prices also affordable for low-income households. No new commitments or policies to ensure donations are predominantly healthy could be identified, and only a slight improvement was seen in the tracking and evidence of donating predominantly healthy products.
- Kellogg, Coca-Cola, and PepsiCo now show evidence of seeking to improve the commercial distribution and placement of their 'healthy' products (or 'less unhealthy' alternatives) in low-income neighborhoods, whereas limited evidence of this was found in 2018.

# Notable Examples



On the website of Unilever's Knorr brand, the company states: "Make Nutritious Food Accessible & Affordable: Knorr believes that wholesome, nutritious food should be accessible and affordable to all, but unfortunately, that is not a reality for everyone today in America." Moreover, the company provided robust evidence of how it was seeking to make this a reality – e.g. through conducting appropriate pricing analyses and designing its 'Better for You' recipes at affordable price points for low-income consumers [NDA]. The company's specific attention to low-income consumers is a clear improvement from 2018, when no companies were found to do this.



In 2021, Campbell began tracking the average cost per serving of its 'Nutrition Focused Foods' against the average cost per serving of the portfolio overall and disclosing the results. It found that these foods cost USD 0.62 per serving on average, compared to USD 0.65 per serving for its entire portfolio. This is the first company in ATNI's Indexes to do this and publicize it, and the company is well-placed to set SMART targets to improve the price differential further in the future. No other companies were found to track the relative affordability of their products.

# C1. Product Pricing

## Do companies have commitments, strategies, and targets in place to improve the affordability of 'healthy' products?

Only Unilever, Campbell, Kellogg, and General Mills were found to make public commitments to address the affordability specifically of their 'healthy' foods in the US. Of these, Unilever was the only company to explicitly commit to reaching low-income consumers.

**Noteworthy Example:** On the website of Unilever's Knorr brand, the company states: "Make Nutritious Food Accessible & Affordable: Knorr believes that wholesome, nutritious food should be accessible and affordable to all, but unfortunately, that is not a reality for everyone today in America." Moreover, the company provided robust evidence of how it was seeking to make this a reality – e.g. through conducting appropriate pricing analyses and designing its 'Better for You' recipes at affordable price points for low-income consumers. The company's specific attention to low-income consumers is a clear improvement from 2018, when no companies were found to do this.

General Mills, Kellogg, and PepsiCo were the only other companies to also provide evidence of having a US-specific strategy to improve the affordability of some of their 'healthy' products (as defined by the company – see Box 3), although only Kellogg discloses this information publicly. Moreover, each of these only applies these strategies to 'healthy' products within specific product categories or brands, rather than across the entire portfolio.

**Table 1. Companies' commitment to improve the affordability of healthy products in the US**

	Company has a formal commitment to improve affordability of healthier products in the US	Company shows evidence of a US-specific strategy	Company specifically considers purchasing power of low-income consumers	Company shows evidence of improving price differential between healthier products and general portfolio	Company discloses its affordability activities
Unilever	●	●	●	●	-
Kellogg	●	●	-	-	●
General Mills	●	●	-	-	-
PepsiCo	-	●	-	-	-
Campbell	●	-	-	●	●

● Yes  
- No/no information

Note: Mars, Nestlé, Conagra, KDP, Coca-Cola, and Kraft Heinz did not show evidence of formal affordability commitments or strategies for their healthy products in the US

However, as in 2018, no companies were found to have defined concrete quantitative targets regarding the affordability of their healthy products, such as improving the price differential between healthy products and general portfolio or achieving a particular price point for 'healthy' products for low-income consumers.

## Is there any evidence that companies have improved the pricing differential of 'healthy' products in the US?

**Noteworthy Example:** In 2021, Campbell began tracking the average cost per serving of its 'Nutrition Focused Foods' against the average cost per serving of the portfolio overall, and disclosed the results. It found that these foods cost USD 0.62 per serving on average, compared to USD 0.65 per serving for its entire portfolio. This is the first company in ATNI's Indexes to do this and publicize it, and the company is well-placed to set SMART targets to improve the price differential further in the future. No other companies were found to track the relative affordability of their products.

### Recommendations

- Six companies did not show clear evidence of seeking to address the affordability specifically of their 'healthier' products in the US. These companies are encouraged to adopt formal commitments and develop strategies to do so, perhaps starting with specific product lines or brands.
- Of the companies with some form of affordability strategies for their 'healthier' products in place, most could go further by specifically ensuring that such products are affordable for low-income consumers in the US. They could begin by conducting pricing analyses to ensure their 'healthier' products are priced appropriately for these groups to afford them.
- All companies could improve the robustness of their affordability commitments and strategies by developing quantitative targets (with baseline and target year) – such as improving the price differential on 'healthy' vs. 'less healthy' products within product categories and ensuring that healthier products are less expensive than their less healthy counterparts, or reaching a certain number of low-income consumers with affordably priced healthy products by a set date.
- Nearly all companies are encouraged to improve by disclosing more information on their affordability strategies, to enhance transparency and accountability.

## Box 2: Companies' definitions of healthy

As previously mentioned, ATNI's methodology for Category C considers companies' affordability and access activities in relation to their 'healthy' products, according to the companies' definition of 'healthy'. Scores are then adjusted based on a 'healthy multiplier,' which uses the results from criterion B3 (which assesses the basic elements, scope and disclosure of a company's NPM) as a proxy for the quality of the company's healthy definition, and adjusts the score accordingly. ATNI takes this approach in order to deal with the limitation of companies using different definitions and nutrient thresholds to determine if products are considered 'healthy' (or 'healthier' alternatives within a product category).

Specifically, companies' definitions do not always align with internationally recognized definitions of 'healthy,' such as the Health Star Rating (HSR) system's 3.5 threshold.

Kellogg, for example, publishes its affordability and accessibility efforts for its Eggo Waffles brand, most of which achieve HSR scores of 3 stars (less than the 3.5 'healthy' threshold), while some specific products score much lower, such as the Eggo Grab & Go Liège-Style Buttery Maple-Flavored Waffles, which score 1.5 stars. General Mills, meanwhile, states that all its breakfast cereal products qualify as 'Nutrition Forward Foods' (the company's 'healthy' definition). ATNI's Product Profile assessment finds that the sales-weighted mean HSR for the category is 2.6, and only 20% exceed the 3.5-star threshold. In both examples, it is not clear whether the company distinguished between the healthier and less healthy varieties in their access and affordability strategies.

It is, therefore, especially important that companies improve their NPMs and definitions of healthy, and ensure they are benchmarked against internationally recognized systems. This will ensure that their affordability and accessibility strategies are being applied to products that contribute to healthier diets.

## C2. Product Distribution

### Do companies have commitments, strategies, and targets in place to improve the accessibility of 'healthy' products through commercial channels?

Eight companies were found to have clear commitments to improving the distribution of their 'healthy' products to low-income/food-insecure households – a clear improvement over 2018, when only four companies did so. Moreover, nearly all these eight disclose their commitments publicly, whereas only one did so previously. This likely reflects the industry's recognition of the food security challenges posed by the impact of the COVID-19 pandemic. Campbell's commitment is of particular note, since it explicitly references the USDA's definition of food access.

That said, only Kellogg, Coca-Cola, and PepsiCo provided evidence of having a deliberate strategy to address accessibility of 'healthy' products (as defined by the company) or 'less unhealthy' products through commercial channels; the rest primarily do so through charitable donations. For example, Kellogg and PepsiCo have worked with dollar stores to ensure their cereals (which the companies define as 'healthy') and 'better-for-you snacks', respectively, are available in stores that are often found in low-income neighborhoods (see Box 4), as well as developing smaller package sizes for healthier products in order to meet the \$1 price-point to ensure they are stocked in dollar stores. In the case of Coca-Cola (and to some extent PepsiCo), as part of its participation in the Balance Calories Initiative, the company is working to distribute in low-income neighborhoods with high rates of obesity and display more prominently its reduced-/zero-sugar beverages relative to their full-sugar counterparts (it should be noted that such products likely do not meet 'healthy' criteria for the companies; rather, they are 'less unhealthy' variants of popular products).

However, as in 2018, no companies were found to have defined concrete quantitative US-specific targets to improve consumers' ability to access their healthy products – such as the number/percentage of stores in low-income/food-insecure neighborhoods stocking their healthy products, or the number of food-insecure households to reach through improved distribution using USDA definitions and ranges.

**Table 2. Companies with commitments, commercial strategies, and philanthropy regarding improving the accessibility of healthy products in the US**

	Company has a formal commitment to improve accessibility of healthier products in the US	Company provides evidence of a US-specific commercial strategy	Company donates healthier products to philanthropic initiatives
Campbell	●	-	◆
Coca-Cola	●	●	◆
Conagra	●	-	◆
General Mills	●	-	◆
Kellogg	●	●	◆
KDP	●	-	-
Kraft Heinz	-	-	◆
Mars	-	-	◆
Nestlé	-	-	◆
PepsiCo	●	●	◆
Unilever	●	-	◆

● Yes  
 ◆ Yes, >60% of products donated met the company's definition of healthy  
 ◆ The company donates products, but does not track their healthiness  
 - No/no information

## Has the accessibility of healthy foods improved through companies' food donations to the charitable food system?

While almost all the companies assessed make in-kind donations to the charitable food system, no new commitments or policies were found regarding the responsible donation of products (i.e. to ensure they are predominantly healthy). That said, Kellogg continues to donate both funds and products to a range of hunger-relief organizations such as Feeding America, No Kid Hungry, Action for Healthy Kids, and the Food Research and Action Center (FRAC). It reports that its product donations are aligned with USDA Dietary Guidelines, the only company to do so.

That said, there were improvements by two companies in the tracking of products being donated. For example, Unilever keeps detailed records of its donations by different brands and the approximate proportion of products that comply with its 'Highest Nutritional Standards'. Meanwhile, General Mills showed evidence that the majority of its product donations meet its internal criteria for 'Nutrient-Forward Foods.' However, no company was able to convincingly demonstrate that more than 80% of their product donations met external 'healthiness' criteria, such as the HER Nutrition Guidelines, which are based on the Dietary Guidelines for Americans.

### Recommendations

- The increase in the number of companies committing to address access to their 'healthy' products is promising. However, the majority of these are encouraged to translate such commitments into commercial strategies and actions to improve the distribution of their healthy products in low-income/food-insecure areas. They are encouraged to work with their distribution and retail partners to make this a reality, rather than focusing predominantly on charitable donations and federal assistance programs.
- All companies could improve the robustness of their accessibility commitments and strategies by developing quantitative targets (with baseline and target year), such as the number/percentage of stores in food-insecure neighborhoods stocking 'healthier' products, or the number of food-insecure households to reach through improved distribution, as defined by USDA definitions and ranges.
- Where philanthropic activities are undertaken to address food insecurity, it is essential that companies adopt policies and tracking systems to ensure these donations are predominantly healthy, to avoid inadvertently exacerbating nutrition issues for the populations they are seeking to help. Companies are encouraged to adopt the HER Nutrition Guidelines for the Charitable Food System, for example.

### Box 3: The Role Dollar Stores Play in US Food Security

There are more than 31,000 Dollar General, Dollar Tree, and Family Dollar stores in the U.S., typically situated in low-income areas without grocery stores or supermarkets.<sup>117</sup> A recent study found that 60% of dollar store shoppers come from households with incomes of less than \$50,000 a year, and 30% from households with less than \$25,000 a year. As such, they are key channels for reaching low-income consumers with affordable products.<sup>118</sup>

However, these retailers have been criticized for crowding out small grocery stores and for selling predominantly unhealthy products, and, in turn, exacerbating obesity and other diet-related diseases among low-income consumers.<sup>119</sup> Manufacturers can help to address this by seeking to ensure that their 'healthier' products are available in these stores by developing smaller packages that meet the \$1 price-point, ideally at a greater rate than their less healthy products.



# Marketing

## Responsible marketing policies and auditing of compliance

Consumers' choices of what to eat and drink are influenced in part by how manufacturers market their products, as outlined in the context chapter of this report. Companies can support consumers in making healthy choices by marketing their products responsibly and prioritizing the marketing of healthier products. Therefore, they need to adopt and publish responsible marketing policies for all consumers, including additional commitments with respect to marketing to children. This category assesses the scope and strength of companies' corporate marketing policies for both general audiences and children – specifically how they align to best practice marketing guidance and standards, and their systems for auditing compliance with their policies.

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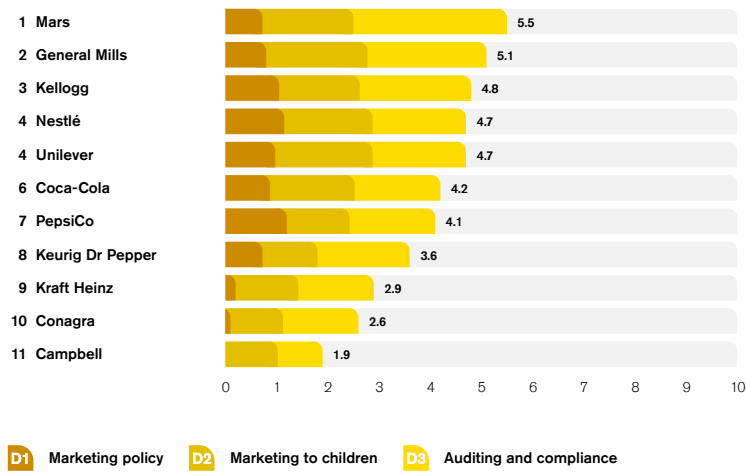
### Category D consists of three criteria:

- D1 Marketing policy: General aspects of responsible marketing
- D2 Marketing policy: Specific arrangements regarding responsible marketing to children, including teens
- D3 Auditing and compliance with policy

### To perform well in this category, a company should:

- Establish and implement a responsible marketing policy covering all consumers.
- The marketing policy should be comprehensive in its scope, i.e., considering all media channels, and should embrace the principles of the International Chamber of Commerce (ICC) general marketing code,<sup>120</sup> as well as the Framework for Responsible Food and Beverage Marketing Communications.<sup>121</sup>
- Commit to substantially increase marketing spending for healthier products relative to the overall marketing budget, including setting quantitative targets for a specified timespan.
- Establish, implement and evaluate a comprehensive policy that explicitly covers responsible marketing practices targeted to children aged 18 years and younger including teens, aged 13-17 years, including all channels and media platforms (i.e., social media, mobile, virtual and marketing communications that use artificial intelligence); locations/settings (i.e., schools grades K to 12 or other places where children gather (YMCA, sports clubs)); child-directed in-store marketing and types of products.<sup>122</sup>
- Make a public pledge to adhere to the Children's Food and Beverage Advertising Initiative (CFBAI)<sup>123</sup> principles, and further commit to not advertise or market food or beverage products that do not meet the uniform nutrition criteria to children under 18 including teens.
- Commission or participate in external independent audits to assess compliance with marketing policies, as well as disclosure of individual results for all types of channels and media platforms (i.e., digital media or TV).

# Ranking



The average score on D is 4.2 out of 10. Overall scores are higher for D2 (marketing to children) and D3 (the auditing strategy and policy of companies) than D1 (marketing policy and strategy for all audiences). Mars scores highest in this category, due to its comprehensive auditing efforts, which was also the case for the 2018 US index. General Mills and Kellogg rank second and third scoring 5.1 and 4.8 respectively, closely followed by Nestlé and Unilever (both scoring 4.7).



# Category Context

With a marketing budget of nearly \$14 billion per year,<sup>124</sup> food, beverage, and restaurant companies in the US exert significant influence over the dietary choices of Americans through the promotion of their products, and is a dominant feature of the food environment. The World Health Organization (WHO) recently published a report revealing the majority of food marketing promotes predominantly unhealthy products that contribute to malnutrition, and that children continue to be exposed to this.<sup>125</sup> This disproportionate marketing of unhealthy foods is widely recognized as a key driver of unhealthy diets, which in turn, are associated with obesity and diet-related non-communicable diseases (NCDs). In the US,<sup>126</sup> <sup>127</sup> a robust evidence base shows that children's and teens' diet-related preferences and behaviors are influenced by the marketing of unhealthy food and beverage products,<sup>128</sup><sup>129</sup> which is a driver of poor diet quality, obesity and diet-related chronic diseases.<sup>130</sup> Corporate marketing practices has led many key stakeholders, including WHO, to call for government and industry to restrict the marketing of unhealthy products, especially to children and teens up to age 17 years.<sup>131</sup><sup>132</sup>

Industry-supported self-regulatory programs or initiatives have been the primary approach to reduce unhealthy food and beverage marketing to children in the US since 2007. For adult consumers, the gold standard for responsible marketing is the Federal Trade Commission's (FTC's) truthful advertising and endorsement guidelines,<sup>133</sup> and the ICC Framework for Responsible Food and Beverage Marketing Communications, which sets out general principles governing all marketing communications. It includes separate sections for sales promotion, sponsorship, direct marketing, digital interactive marketing, and environmental marketing.<sup>134</sup> However, ATNI encourages companies to go beyond this, and adopt commitments, concrete targets, and tracking systems to promote their healthier products and variants at a proportionately greater rate than their less healthy products.

Industry self-regulatory programs or initiatives that include the Children's Food and Beverage Advertising Initiative (CFBAI) and Children's Advertising Review Unit (CARU), are administered by the Better Business Bureau (BBB).

**CARU** addresses how foods (and all products) are advertised to children under 12 years old, accounting for their vulnerabilities by ensuring that advertising directed toward them is truthful, not misleading, unfair, or inappropriate. The Guidelines also reflect the requirements of the Children's Online Privacy Protection Act (COPPA) of 1998<sup>135</sup> which prohibits unfair or deceptive acts or practices in connection with the collection, use, and/or disclosure of personal information from and about children on the Internet.

The **CFBAI** requires member companies to advertise only food, beverage and meal products that meet CFBAI's Uniform Nutrition Criteria to children under age 12 years on media covered under the program, or not to advertise any products at all. The program consists of 20 US food and beverage and quick-serve restaurants among its members, including all of the companies assessed in this Index, which together accounted for 74% of advertising on children's television in the US in 2020.<sup>136</sup> The Uniform Nutrition Criteria were revised in 2018 and implemented in 2020. It should be considered that the nutrition criteria are not as stringent as criteria used in government regulatory policies (e.g., UK, Chile), and these nutrition criteria allow certain products that experts do not recommend for children, such as drinks or foods with high sugar, fat, or sodium content for some categories. It should be noted, however, that WHO defines 'children' as those below 18 years old, while a 2015 US Expert Panel<sup>137</sup> advised to include children from birth through age 14. Other recommendations from this expert panel that are still relevant – and not been adopted by CFBAI-participating companies that relate to the marketing definition to include products and brands, audience thresholds for children, marketing settings, and on-pack and in-store marketing (see Box 1).

## Box 1. Measuring marketing techniques, the caveats

Food and beverage marketing is a dynamic field that quickly changes based on developments in technology, updated federal and state regulations, and new insights into marketing techniques and opportunities.

ATNI strives to monitor improvements in marketing commitments by food and beverage companies in relation to priority topics in this constantly changing field. Below, we mention some of the nuanced issues that are currently not specifically addressed by the ATNI methodology, as they go beyond data available to the organization:

- **Brands vs. products:** The CFBAI has set nutrition criteria for products which meet health standards and are therefore deemed permitted to be advertised to children. Advertising and promotion of products within a brand family that meet the criteria could spill over and affect purchase decisions for other products of the same brand that do not meet such criteria.<sup>138139</sup>
- **Making impact:** Reformulation strategies – for example, those based on the CFBAI nutrition standards or the Smart Snacks in School program – should be founded on scenario analysis of the highest possible positive health impact based on actual sales and consumption data. This allows for modeling exercises to assess the extent that these foods and beverages will contribute to the improvement of public health. Reformulating products which are widely consumed will have a larger impact on improving public health compared to products which are consumed by a small proportion of the population.<sup>140</sup> However, reformulated products included in the CFBAI only make up a small proportion of the food supply in the US, and thus the impact on providing healthier products on a large scale is limited.<sup>141</sup>
- **'It's in the fine print':** All companies have their own tailored marketing policy. Where some policies include an extensive list of the media forms and marketing techniques it entails, others are brief and indistinct. There are many widely established forms of marketing that are excluded from industry self-regulation e.g. child-directed product packaging and in-store marketing, and sponsorships of children's events/activities. This leaves room for loopholes that enable unhealthy foods to be marketed to children without breaching a company's policy.<sup>142</sup>

ATNI has started testing the use of tools to extract online retail data, to have more independent performance indicators that will complement the current set of indicators on this topic.

# Relevant Changes to the Methodology

- The Category weighting has been reduced by 2.5% points, due the introduction of the Product Profile elements in Category B.
- The methodology is aligned with the updated ICC Framework for Responsible Food and Beverage Marketing Communications, 2019.
- The number of criteria is reduced from six to three, and the number of indicators is reduced from 53 to 33. Also, there is more focus on marketing to children practices, including teens (up to age 18), and efforts that go beyond CFBAI core commitments.
- An 'age' multiplier is introduced, to evaluate the extent to which companies' marketing policies cover both children and teens.
- Auditing and compliance practices are assessed for marketing in both the general population and children.

# Key Findings

- Compared to 2018, when eight (out of 10) companies pledged to support the ICC code, fewer companies (seven out of 11) made such a commitment in this iteration. Four companies go beyond the ICC pledge, demonstrating best industry practices (e.g. to present products in the context of a balanced diet); a slight improvement since 2018, where this commitment was made by three companies.
- While five companies have made a commitment to increase their marketing spending on healthier products relative to overall marketing spending, none of these companies have set quantitative targets for a specified timespan. As marketing influences purchasing behavior, all companies are encouraged to increase their marketing budgets for the promotion of healthier products and make such commitments public expressed as a percentage of the overall marketing budget as to avoid giving away commercially sensitive information.
- Since 2018, Mars remains the only company that has commissioned an independent, third-party audit of its marketing compliance to children and all consumers. All companies are recommended to adopt this approach.
- In 2018, 32 percent of U.S. children and teens (2-19 years) experienced overweight or obesity, and robust evidence links corporate marketing practices to their obesity risk. It is critical that all food and beverage companies responsibly market their products to children, including teens, and follow internationally recognized standards set by WHO, UNICEF and the ICC. Companies must ensure that their commitments, policies and practices are comprehensive and explicitly cover all marketing communication channels and media platforms; locations/settings; and applicable to all products.
- While all companies commit not to market or advertise their products in primary schools, this commitment is made by just four companies for secondary schools. Only two companies committed not to market in other places where children gather (e.g., YMCAs, after-school clubs, Boys and Girls Clubs, etc). Companies must not market in or near secondary schools, and extend this pledge to other places popular with children.
- While all companies define children as either 12 or 13 years, Unilever has announced it will increase this threshold to 16 years as of 2023 (though this was announced after the assessments for this US index were performed). All companies – and the CFBAI – are strongly encouraged to adopt either the ICC 2018 framework that applies to children, including teens up to 17 years, and the United Nation (UN) definition of a child as up to 18 years old based on the 1989 International Convention on the Rights of a Child.

# Notable Examples



Out of all companies assessed, Nestlé's marketing policy is most explicit on what marketing communication techniques it includes (e.g., native online, influencer, and viral), but also on which media it covers (own, third-party, and user-generated media).



Unilever made a new commitment not to market their products to children and, in April 2022, also announced that it is raising the age threshold of this commitment to all under 16s – being the first US Index company to use this age limit and the closest to the International Child Rights Convention's definition of a 'child' (18 years).



# D1. Marketing policy to all consumers

## To what extent did companies strengthen their commitments to market responsibly to the general consumer?

All companies, with the exception of Kraft Heinz and Campbell, published a policy for responsible marketing to all consumers that is applicable to the US. Six companies' policies include all forms of marketing embedded within the ATNI methodology (print, broadcast, digital media, point of sale, sponsorship, and other marketing forms), with General Mills, Kellogg, and PepsiCo scoring higher in this regard since 2018.

Seven companies (see Table 1) that pledged to adopt the 2018 ICC Framework for Responsible Food and Beverage Marketing Communications scored highly on marketing policy commitments with regards to fair representation (i.e., marketing should be truthful to the appearance and other characteristics of the product) of their products (for example, on health or nutrition claims and appropriate portion sizes). Kellogg joined Mars, Nestlé, and Unilever to commit to industry's best practices to not use any models with a body mass index (BMI) of under 18.5 and/or to present products in the context of a balanced diet.

**Table 1. Companies' pledges to commit to international marketing guidelines**

	CFBAI 2021 principles	CARU public pledge	IFBA	2018 ICC framework
Campbell	●	●	-	-
Coca-Cola	●	●	●	●
Conagra	●	●	-	-
General Mills	●	●	●	●
Kellogg	●	●	●	●
KDP	●	-	-	-
Kraft Heinz	●	●	-	-
Mars	●	●	●	●
Nestlé	●	●	●	●
PepsiCo	●	●	●	●
Unilever	●	●	●	●

● Company has a commitment  
 - No/no information

Note: CFBAI = Children's Food and Beverage Advertising Initiative; CARU = Children's Advertising Review Unit; IFBA = International Food & Beverage Alliance; ICC = International Chamber of Commerce

## Do companies seek to increase their marketing spending on their healthier products, relative to overall marketing budgets?

Encouragingly, five companies, including Kellogg and Nestlé, commit to proportionately increase their marketing spending on healthier product variants, while PepsiCo and Coca-Cola commit to market their reduced-calorie beverages at a greater rate than full-calorie ones. This is a notable improvement since 2018, when only one company was found to do so. However, none of these companies have set quantitative, time-bound targets for marketing spending to ensure that their healthier products are marketed at a higher rate than less healthy products. Doing so would cement their commitment, and increase accountability to stakeholders.

## Recommendations

- Four companies that have not yet aligned their marketing commitments with minimum standards for responsible marketing, as per the ICC framework, should do so. The ethical guidelines published by the ICC in 2018 are a minimum set of standards to ensure responsible marketing and safeguarding better nutrition for the general audience.
- All companies are encouraged to set quantifiable targets and timelines to increase their marketing of healthy food and beverage products relative to less healthy products in their product portfolios. These firms should be transparent about the criteria used to define 'healthy' or 'healthier', in order to promote a shift towards healthy eating patterns aligned with the Dietary Guidelines for Americans 2020-2025.<sup>143</sup> These companies are encouraged to track their relative marketing expenditures and publicly disclose their progress.

# D2. Responsible Marketing to Children

## How extensive and comprehensive are companies' commitments regarding responsible marketing to children in the US?

Nestlé, Mars, Coca-Cola, and Unilever commit not to directly market (a selection of) their products to children (under 12 years in the case of Nestlé, and under 13 years for the other companies). In April 2022, Unilever also announced that, as of 2023, it is raising the age threshold of this commitment to all under 16s – being the first US Index company to use this age limit and the closest to the International Child Rights Convention's definition of a 'child' (18 years). The remaining companies commit to only market products meeting internal 'healthy' criteria to children, of which PepsiCo and Coca-Cola increased its age threshold to 13 years. It is also worth noting that the CFBAI will raise the age threshold to 13 years effective 1 January 2023, requiring all participating companies to align with this policy.

An extensive list of aspirational commitments relating to restricting specific marketing messages and techniques has been assessed, including those related to supporting the role of parents; not creating a sense of urgency; not using celebrities, fantasy, or animated characters; and many more (see Table 2). Kellogg's and Unilever's updated policies, closely followed by Mars and General Mills, now capture these commitments most comprehensively in comparison to other companies' policies, including Nestlé's, which was the strongest in this regard in 2018.

**Table 2. Companies' commitments for marketing to children techniques and messages**

	Campbell	Conagra	General Mills	Kellogg	KDP	Mars	Nestlé	PepsiCo	Coca-Cola	Kraft Heinz	Unilever
Not to create a sense of urgency (Article 18)	●	●	●	●	-	●	●	●	●	●	●
Not to use inappropriate price minimization (Article 18)	●	●	●	●	-	●	●	●	●	●	●
Not to exploit a child's imagination in a way that could mislead him/her about the nutritional benefits of the product involved	●	●	●	●	-	●	●	●	●	●	●
Supporting the role of parents or others responsible for guiding diet and lifestyle choices or not to undermine the role of parents or others responsible for guiding diet and lifestyle choices	●	●	●	●	●	●	●	●	●	●	●
To apply child online privacy and data protection standards (like COPPA) and monitor the audiences of their marketing techniques to determine whether it has become popular with children, even though they may not have been the intended audience	●	-	●	●	-	●	-	●	●	●	●
Not to brand merchandise aimed at children except related to healthy products	-	-	-	●	-	-	-	-	●	-	-
Not to sponsor people, materials or activities popular with children at all or only for healthy products	-	●	●	●	●	●	●	-	●	●	●
Not to use celebrities and other people with strong appeal to children in marketing of products at all, or only for healthy products	●	●	●	●	●	●	●	●	●	●	●
That if celebrities or others (including influencers) are used in marketing, they will not imply that their performance or status has improved through use of the product	●	●	●	●	-	●	●	●	●	-	●
Not to depict children on packaging at all or except for healthy products	-	-	-	-	-	-	-	-	-	-	●
Not to make use of promotional games, toys, vouchers, competitions etc. in their marketing to children, or only for healthy products	-	-	●	●	●	●	●	-	●	-	●
Not to use (third-party or own) fantasy or animated characters with a strong appeal to children in marketing of products at all, or only for healthy products, IN ALL FORMS OF MARKETING	●	-	●	●	●	●	-	-	-	-	●

● Company has a commitment  
- No/no information



In addition to their own policies regarding marketing to children, all companies commit to following both the CFBAI policy and CARU guidelines, with the exception of KDP (which joined CFBAI in 2019 but is yet to commit to CARU). Consequently, the companies' policies cover a broad range of marketing media, including print, broadcast, electronic/digital, and other forms, such as cinema, product placements, etc. Beyond this, only Unilever's policy explicitly includes all in-store or point-of-sales marketing (including packaging); whereas General Mills and Kellogg are the only companies that explicitly include 'Sponsorship' (for example, of sporting, entertainment, or cultural events or activities) in their lists.

For restrictions on marketing to children, companies apply an audience threshold for media to determine when the restriction should apply. Most companies apply their marketing restrictions when children make up 30% or more of the audience, as per CFBAI's updated policy – but best-performing companies (KDP, Unilever, Mars, and Nestlé) go further and apply a threshold of 25% (in-line with the 2015 US Expert Panel (HER) recommendations), where KDP and Unilever have increased their threshold since 2018.

### **Digital Marketing**

For online marketing, digital tools should be applied to ensure marketing messages do not reach children under the age threshold that companies commit to. All companies report that they review age-related data; ensure the design of their digital websites, pages, social media, or apps do not attract young children; and assess the nature of third-party websites. Some companies go further and also commit to include age-screening prior to logging on/registering or review visitor profiles of third-party websites; Mars and General Mills do both. Where the ICC Framework for Responsible Food and Beverage Marketing Communications specifically addresses digital marketing, comprehensive guidelines on this quickly evolving marketing space should be emphasized and should be taken up by companies and incorporated in their marketing policies (see Box 2).

### **How extensive are companies' commitments to restrict marketing in and near schools and other places popular with children?**

As in 2018, all companies assessed commit to not market or advertise in primary schools, either for all or only in relation to healthier products. General Mills, Nestlé, Kraft Heinz, and Unilever demonstrate leading practice by also extending this commitment to secondary schools – a clear improvement since 2018, when only General Mills and Kraft Heinz did so. Moreover, Unilever and Coca-Cola now extend their responsible marketing commitments to other places where children gather alongside Nestlé, which was the only company to do so in 2018.

### **Recommendations**

- While ATNI acknowledges that companies are slowly moving in the right direction, they are encouraged to further increase the age threshold for their marketing restrictions to 18 years, as recommended by UN agencies including WHO and UNICEF, to ensure *all* children (including teens and adolescents) are sufficiently safeguarded from the marketing of unhealthy products. Also, an audience threshold of 25% should be adopted by all companies.
- ATNI recommends all companies commit not to market to children at all.
- Companies are encouraged to extend their marketing restrictions to fully cover the school environment, including secondary schools, and other places where children, including teens, typically gather.
- To enhance transparency and accountability, companies should be as explicit and comprehensive as possible in describing the forms of marketing and media their policy applies to. This is especially the case for digital marketing, giving that this is a rapidly evolving field, and it cannot be taken for granted that companies and other stakeholders have the same definitions of terms such as 'all media', for example.

## Box 2: Digital Marketing to Children

The proliferation of marketing techniques through digital media has caused alarm among concerned stakeholders. Children are a particularly vulnerable demographic in the digital marketing sector, as they are targeted by marketing techniques that exploit how they use the Internet for social networking, video-sharing, gaming, etc. Despite being 'digital natives', research shows that only a minority of children can identify sponsored content. For example, 24% of children aged eight to 11, and 38% of those aged 12 to 15, can correctly identify sponsored search links on Google. Stakeholders' fears around digital marketing to children are compounded further by the increase in screen-time and online learning that resulted from COVID-19 restrictions.<sup>144</sup> Out of all companies assessed, Nestlé's marketing policy is most explicit on what marketing communication techniques it includes (e.g., native online, influencer, and viral), but also on which media it covers (own, third-party, and user-generated media).

# D3. Auditing and Compliance

## **To what extent do companies audit compliance with their responsible marketing policies, for both children and general audiences?**

All 11 companies are subject to annual CFBAI audits of their compliance with marketing to children policies, which monitor their advertisements on child-directed TV, print, radio, the internet (including company-owned websites, third-party websites, and child-directed YouTube channels), and mobile apps in the US, as well as a self-assessment report.<sup>145</sup> However, not only does this not cover the full range of media their policies apply to, but it also does not cover their responsible marketing policies for the general audience.

Mars is the only company who hires an independent external auditor unrelated to an industry association and performs an audit of their marketing policy for both the general audience and children. Their audit covers all media specified in the policy: Not just TV and digital media, but also publishing, social media, and posters/billboards.

## **How far do companies comply with their marketing policies?**

According to the latest CFBAI Audit report,<sup>146</sup> it found “excellent compliance” in 2020, and there were “very few occasions when foods that did not meet CFBAI’s Uniform Criteria were advertised to children in covered media”.

For other channels, such as television, digital, and mobile (including company-owned websites, in-app advertising, and child-directed YouTube channels), some instances of non-compliance were found. The report provides commentary on these, naming the companies involved and the steps taken to rectify their actions – although it is not clear if this constitutes a comprehensive list of instances of non-compliance, or are just some indicative examples.

It is important that companies also disclose information about their individual audits and their findings on their own domains. Only three companies (General Mills, Kellogg, and KDP) were found to publish the CFBAI results on their own website, although this is an improvement since 2018, when it was only PepsiCo. Mars, meanwhile, only publishes its compliance levels for specific media at a global level, and overall compliance at regional levels (e.g. ‘North America’); it is not specific about its compliance in the US market, nor by media type.

It should be noted, however, whether it is performed by an industry-led organization such as CFBAI or an external auditor (independent from industry), its credibility is only as valid as the quality and comprehensiveness of the policy it assesses. An audit of a weak marketing policy will not add much weight to the credibility of the marketing policy.

## **Do companies have robust responsive mechanisms in place to deal with instances of non-compliance?**

Seven companies (General Mills, Kellogg, Mars, Nestlé, PepsiCo, Coca-Cola, and Unilever) now report their response mechanisms for instances of non-compliance, whereas only Mars did so in 2018. ATNI found some of these response mechanisms to be more structured and robust: General Mills, for example, deals with issues of non-compliance through its Responsible Marketing Council, commissioning training where necessary as part of the remediation. The CFBAI auditing report also provides numerous examples of actions taken by specific companies to remedy issues of non-compliance. Generally, most companies report that, due to a low number of such instances, the corrective action taken is always specific to the case at hand, rather than a systematic approach.

## Recommendations

- Companies are encouraged to audit their full marketing policy and be more transparent about their auditing results, providing both quantitative and qualitative information for specific media and marketing forms in their reporting/websites.
- All companies should ensure they have robust corrective mechanisms in place for when instances of non-compliance are found, and that these are publicly disclosed.
- Category D1 and D2 relate to establishing and implementing a marketing policy to cover all consumers and children respectively and having strong and solid policies in place are essential before auditing and compliance measures are performed. All companies should primarily focus on establishing comprehensive marketing policies especially for children, including teens, as not having those in place makes auditing and compliance measures less relevant

# Marketing of Breast-milk Substitutes

## The importance of breastfeeding

Nutrition is particularly important within the first 1,000 days of a child's life (from conception to age two).

Optimal breastfeeding is a crucial element of infant and young child nutrition. The World Health Organization (WHO) recommends that infants everywhere be breastfed exclusively for the first six months, at which point safe, appropriate complementary food (CF) should be introduced to meet their evolving nutritional requirements. The WHO also notes that CF should not be used as breast-milk substitutes (BMS), and that infants and young children should continue to be breastfed until they are aged two or older (WHO, 2003).

Breastfeeding has long been proven to provide myriad significant health benefits compared to baby formula. These benefits are unique to breastfeeding and help both mother and infant (Chowdhury *et al.*, 2015; Sankar *et al.*, 2015). Positive long-term benefits for infants include protection against becoming overweight or obese, as well as against certain non-communicable diseases such as diabetes mellitus (Victora *et al.*, 2016).

However, several factors, including employment, that are not supportive of breastfeeding, may influence women's and parents' choices of resorting to formula milk instead of breastfeeding (WHO and UNICEF, 2022). Formula milk has its place for women and parents who unable or do not want to breastfeed, often the result of other factors – such as employment – that are not supportive of breastfeeding.

## Breastfeeding rates and trends

In the United States, according to national figures from the National Immunization Survey (NIS) 2011-2018, 25% of infants in 2018 were exclusively breastfed through six months compared to 18.8% in 2011. As seen in Figure 1, breastfeeding rates through six months vary from state to state, with no single state in 2017 having breastfeeding rates higher than 38.1%. Further, 83.9% of infants were ever-breastfed in 2018, compared to 79.2% in 2011. Rates of exclusive breastfeeding through three months also rose from 40.7% in 2011 to 46.3% in 2018. The percentage of breastfeeding was lower among infants aged 12 months, but increased between 2011 and 2018 (from 26.7% to 35%) (CDC, 2018). Despite increases in breastfeeding in the recent years, figures still fall short of the World Health Assembly (WHA) global target of at least 50% of infants under six months of age to be exclusively breastfed by 2025 (WHA, 2018).

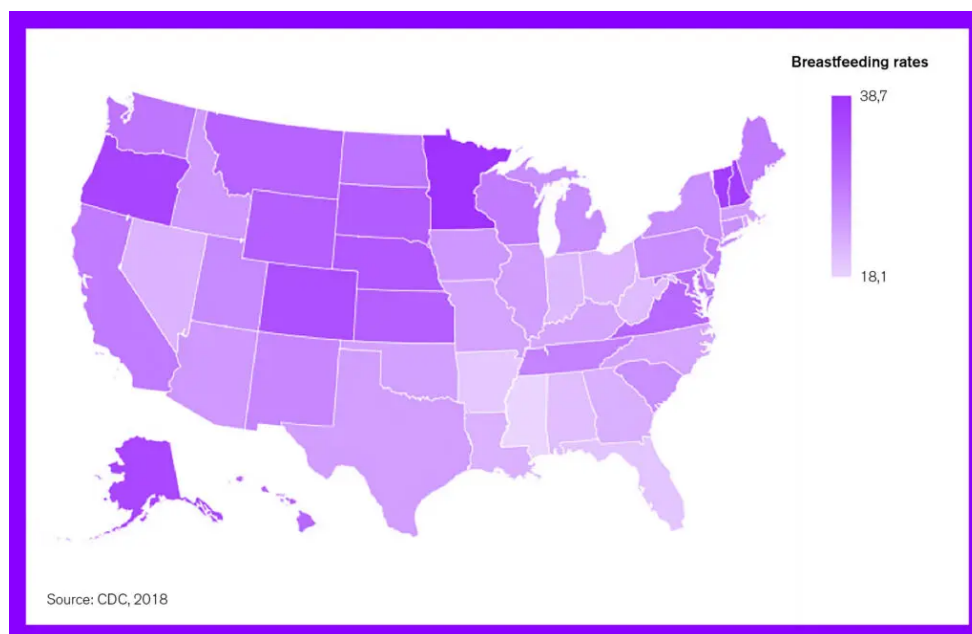
According to the national figures in 2018, supplementation with infant formula before two days was 19%, 31% before three months; and 35.8% before six months (CDC, 2018).

The US Breastfeeding Committee has shared comprehensive policy solutions to address the infant formula shortage, with the following actions outlined to support breastfeeding and ensure infant nutrition security:

- Establish a national paid family and medical leave program. The FAMILY Act (S. 248/H.R. 804) would ensure that families have time to recover from childbirth and establish a strong breastfeeding relationship before returning to work.
- Ensure all breastfeeding workers have time and space to pump during the workday. The Providing Urgent Maternal Protections (PUMP) Act (S. 1658/H.R. 3110) would close gaps in the Break Time for Nursing Mothers Law, giving nine million more workers time and space to pump.

- Invest in the CDC Hospitals Promoting Breastfeeding program by increasing funding to \$20M in FY2023. This funding helps families start and continue breastfeeding through maternity care practice improvements and community and workplace support programs.
- Create a formal plan for infant and young child feeding in emergencies. The DEMAND Act (S. 3601/H.R. 6555) would ensure the Federal Emergency Management Agency can better support access to lactation support and supplies during disasters.

**Figure 1. Breastfeeding rates through six months among infants born in 2017 by state**



### The International Code of Marketing of Breast-milk Substitutes

The International Code of Marketing of Breast-milk Substitutes is a global health policy framework developed by WHO in 1981 to regulate the marketing of breast-milk substitutes in order to protect breastfeeding. Since 1981, 18 WHA resolutions have been adopted to clarify and extend the requirements of the International Code (WHO, 2020). The International Code, along with all subsequent relevant WHA resolutions, are considered together and are hereinafter collectively referred to as ‘the Code’.

According to the Code, breast-milk substitutes are any milks, both in powdered and liquid form, which are specifically marketed for feeding infants and young children up to the age of three. BMS products therefore include infant formula (intended for infants aged zero to six months), follow-up formula (intended for older infants between six and 12 months), and growing-up milks (intended for young children aged 12-36 months and also known as *toddler milks* in the US), and all formulas for special medical purposes (intended for infants and young children aged 0-36 months). Other BMS products include foods and beverages promoted as being suitable for feeding a baby during the first six months of life, including baby teas, juices, and waters, as well as feeding bottles and teats (WHO, 2017). All provisions of the Code apply to all types of BMS, which cover, inter alia, restrictions on the advertising, point-of-sale promotion, and marketing of the products within healthcare facilities, as well as required information on product labels around the appropriate use of BMS. The guidance associated with WHA 69.9 also saw requirements introduced in 2016 concerning the marketing of complementary foods (intended for older infants and young children between six to 36 months of age) of appropriate nutritional quality.

Although the Code is not legally binding, it is expected that governments “take action to give effect to the principles and aim of this Code, as appropriate to their social and legislative framework, including the adoption of national legislation, regulation or other suitable measures” (Sub-article 11.1 of the Code) (WHO, 2020). The United States did not ratify the original Code in 1981 and is one of the few countries not to have adopted any Code provisions (WHO, 2022a).

While the government has a responsibility to fully implement the Code in national legislation, the Code states that “independently of any other measures taken for implementation of the Code, manufacturers and distributors of products within the scope of the Code should regard themselves as responsible for monitoring their marketing practices according to the principles and aim of this Code, and for taking steps to ensure that their conduct at every level conforms to them” (Sub-article 11.3 of the Code) (WHO, 2020).

### BMS/CF companies

Abbott, Reckitt, and Nestlé are the largest players in the baby food market: Together, they account for nearly 72% of the total baby food market share and for 89% of breast-milk substitutes alone. The most prominent brands are Enfamil (Reckitt), Similac (Abbott), and Gerber (Nestlé): Combined, they have 65% of the total baby food market in the United States (Euromonitor, 2021). Most recent data shows that, in 2021, 35% of Reckitt's, 45% of Abbott's, and 11% of Nestlé's food baby global sales were attributed to sales in the US.

Among the companies assessed in ATNI's 2021 BMS/CF Marketing Index, Abbott, Danone, Nestlé, and Reckitt were reviewed on their BMS market in the United States. Danone and Nestlé were also assessed on complementary foods. The following section describes these companies' policies and how they are applied in the US, based on the 2021 BMS/CF Marketing Index assessments.

Each of the four companies has at least one policy addressing the marketing of breast-milk substitutes. However, neither Danone nor Nestlé was found to have a policy on the marketing of complementary foods. Table 3, below, provides an overview of each company's commitments around BMS marketing, and their level of alignment to the provisions of the Code. Among the four companies, Abbott has relatively weak commitments in alignment with the Code, whereas those of the remaining three vary across different forms of marketing.

**Table 3. Alignment of companies' BMS marketing policies to the Code**

Article of the Code	Abbott	Danone	Nestlé	Reckitt
Article 4 Information and Education	-	●	●	●
Article 5 The General Public and Mothers	-	●	●	●
Article 6 Health Care Systems	-	-	●	-
Article 7 Health Workers	-	●	●	●
Article 8 Persons Employed by Manufacturers and Distributors	-	●	●	●
Article 9 Labeling	-	●	●	-
Article 10 Quality	●	●	●	●
Article 11 Implementation and Monitoring	-	●	●	●

● Policy alignment score ≥95%  
 ● Policy alignment score ≥75%  
 - Policy alignment score is <75%

\* Including subsequent relevant WHA resolutions

### How are these commitments applied in the US?

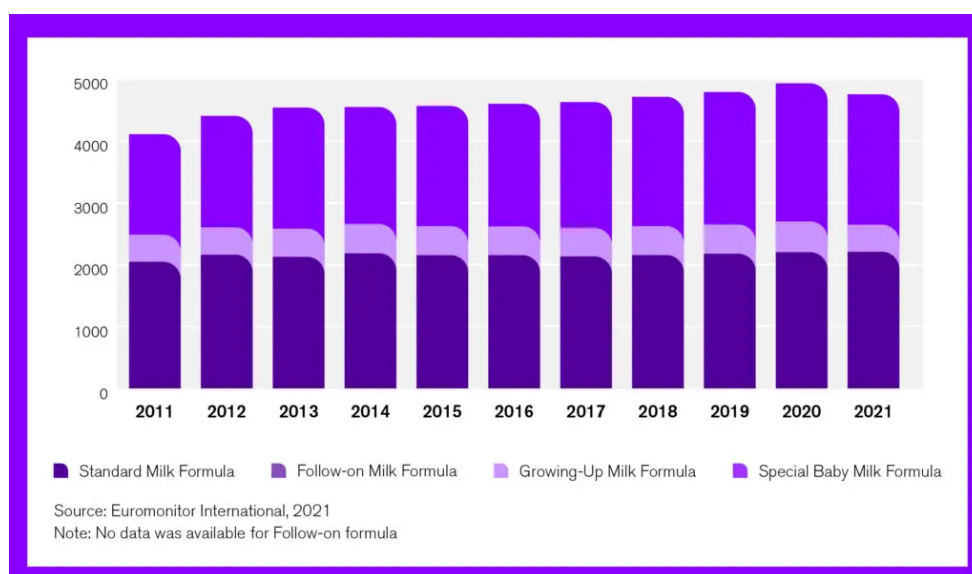
As shown in Table 4, despite the companies having policies around the marketing of breast-milk substitutes, the commitments outlined do not apply in the US as it is classified as a 'lower-risk' country<sup>147</sup>. However, this is an exception in the case of Abbott and Danone, which universally uphold their BMS marketing commitments even in countries where local Code regulations are absent or less stringent than their own policies<sup>148</sup> – although this is only in relation to their infant formula products intended for infants under six months of age. Abbott's commitment to *upholding* its BMS marketing policy for infant formula globally is new; however, this updated policy (dating May 2020) has been found to be less aligned with the Code compared to the assessment of the company's prior policy in the 2018 Index. Nestlé, on the other hand, committed in its [public response](#) to the BMS Call to Action<sup>149</sup> to unilaterally stop the promotion of infant formula for infants 0-6 months of age in all markets by the end of 2022, and outlined in its [roadmap](#) the company's plan to explicitly extend its policy to the US, where Code regulations are absent. With regards to follow-up formula (6-12 months), the companies only uphold their BMS marketing commitments in 'higher-risk' countries – while Reckitt and Nestlé (at the time of the 2021 BMS/CF Marketing Index assessment) similarly do so for their infant formula (0-6 months) products.

**Table 4. Companies' marketing commitments as applicable to its products in the US market**

Product types	Abbott	Danone	Nestlé	Reckitt
<b>BMS</b>				
Infant formula 0-6	●	●	-	-
Follow-on formula 6-12 months	-	-	-	-
Growing-up milks/toddler milk 12-36 months	-	-	-	-
Complementary foods 0-6 months	n/a	-	-	●*
<b>Complementary foods</b>				
Complementary foods 6-36 months	n/a	-	-	n/a
<ul style="list-style-type: none"> <li>● Company covers product in the US market</li> <li>- Company does not cover product in the US market</li> </ul>				
* While Reckitt's BMS marketing policy covers complementary foods for those under six months of age, the company shared that it does not currently manufacture this product type.				

No commitments are applied in any market, however, to the marketing of growing-up milks (aka toddler milks) or complementary foods. As shown in Figure 2, baby food sales have increased in the past 10 years. Among all, a larger increase is seen in complementary foods, followed by formulas for special medical purposes.

**Figure 2. Growth of sales of baby food by category in the US 2011-2021 (USD million)**





## Research on companies' marketing practices in the US

Data on advertising spending suggests that toddler milks are being increasingly promoted in the US, while infant formula advertising is declining. Concerns over the marketing of toddler milk include confusing caregivers between the types of milk formulas intended for different age groups, and promoting products with misleading claims while their nutritional quality is problematic (Harris and Pomeranz, 2020). The American Academy of Family Physicians has noted the additional cost of toddler milks and that these products have no proven advantages over whole milk (O'Connor, 2009) – particularly as research shows toddler milks contain more sodium and less protein than whole cow's milk, and the added sugars in toddler milks are not recommended for young children's consumption (Vos *et al.*, 2017).

There are similar concerns over the nutritional quality and thus marketing of CFs, as research has shown that most CFs sold in the US contain added sugars and have high levels of sodium (Maalouf *et al.*, 2017). Furthermore, in 2016-2018, nearly one in three (32%) US infants was introduced to complementary foods before the age of four months, with 51% being introduced at 4-6 months. A higher prevalence of early introduction was seen among Black infants and infants of lower socioeconomic status (Chiang *et al.*, 2020).

A study by Pomeranz *et al.* (2021) found several promotions in the form of coupons, discounts, rewards, and direct contact on the US websites of Enfamil (MeadJohnson), Similac (Abbott), and Gerber (Nestlé) (in decreased order of findings). Among the three brand websites, Similac's infant feeding content was found to have more mentions of negative breastfeeding issues relative to positive breastfeeding mentions, followed by Enfamil. Such marketing practices could discourage breastfeeding and encourage the use of infant formula (Pomeranz *et al.*, 2021). The WHO report published this year on the scope and impact of digital marketing in promoting breast-milk substitutes found that BMS brand accounts were highly active on social media in the United States. The research also found that BMS brand accounts published content about breastfeeding in addition to content about their own brand and products. Therefore, mothers who search for information about breastfeeding are likely to be exposed to content that directs them towards a BMS brand (WHO, 2022b). Apart from online and digital marketing, research has shown that other marketing techniques prohibited under the Code are common in the United States, including products labeled with inappropriate messages and claims, and promotions throughout the healthcare system, such as free samples offered in hospital discharge packs, which has been shown to be associated with lower breastfeeding rates (Harris and Pomeranz, 2020).

## Recommendations to companies

The 2022 status report on the national implementation of the Code reveals that, to date, the United States continues to not have any legal measures related to the Code (WHO, 2022a). Coupled with the fact that studies show BMS marketing is prevalent in various forms in the country, the role of companies in ensuring their practices are Code-aligned is paramount. To do so, BMS and CF manufacturers are urged to fully align their policies and practices with the provisions of the Code, apply the Code provisions in all markets they sell their baby food products in (with no distinction between higher- and lower-risk markets as every child has the right to optimal health, and in relation to all products<sup>150</sup> covered by the Code), and to uphold those commitments irrespective of whether national regulations are absent or weaker than the company's policy.

*ATNI has developed a model company policy, which consolidates the provisions of the International Code of Marketing of Breast-milk Substitutes adopted in 1981, along with the subsequent WHA resolutions, to guide manufacturers in responsible BMS marketing that is fully aligned with the Code.*



# Workforce Nutrition

## Supporting healthy diets and nutrition programs in the workforce

Companies can support the nutritional status of their staff by implementing workforce nutrition programs, ensuring their employees have access to healthy foods at work, and providing nutrition education and nutrition-focused health checks. In addition, by supporting parent-friendly working practices and providing appropriate facilities for breastfeeding mothers at work, companies can ensure their employees' infants have the healthiest start in life.

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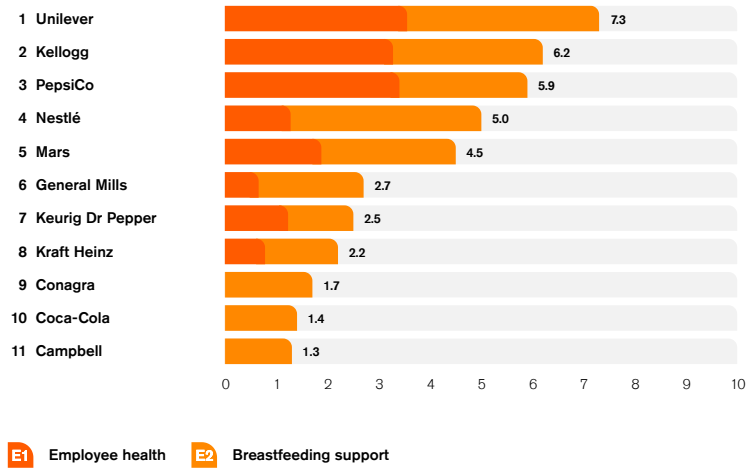
### Category E consists of two criteria:

- E1 Supporting Employee Health and Nutrition
- E2 Supporting Breastfeeding Mothers at Work

### To perform well in this category, companies should:

- Publicly commit to support employee health and nutrition in the U.S. through a workforce nutrition program, which includes expected outcomes and is available to all employees and their family members.
- Implement a workforce nutrition program consisting of healthy food at work, nutrition education, and nutrition-focused health checks. Evaluate the program and publish information about the results.
- Formally grant paid parental leave of at minimum 14 weeks, as well as offering arrangements to support breastfeeding mothers in the workplace.

# Ranking



Overall, scores decreased in Category E, with the average score decreasing from 4.1 to 3.7 out of 10. Unilever now leads the category with 7.3 out of 10, while Kellogg also demonstrated significant improvement. Being signatories of the WNA, both performed well in E1 and showed strong performance in E2. Kraft Heinz and KDP are also commended for improving their performance significantly, having both introduced new policies since 2018 regarding workforce nutrition and supporting breastfeeding mothers.

# Category Context

## Workforce Nutrition

Given that 58% of the global population spends at least one-third of their adult lives at work,<sup>151</sup> workforce nutrition programs have been identified by the World Health Organization (WHO) as a key solution to addressing malnutrition.<sup>152</sup> Studies have found returns on investment (ROI) of 6:1 for workforce health programs that include nutrition – finding positive associations with productivity and cognitive ability, along with reduced absenteeism, medical costs, and rates of accidents/mistakes.<sup>153</sup> Workforce nutrition programs can also increase employee morale and motivation, improve employer/employee relations, and reduce staff turnover. In addition to these benefits, such programs can help facilitate a company culture with a greater focus on nutrition in its business practices.

The Workforce Nutrition Alliance (WNA, see Box 1) has identified four main types of effective workforce nutrition interventions for companies' employees:<sup>154</sup>

- **Healthy food at work.** Programs that focus on increasing employees' access to healthy and safe foods at work – either through direct provision or subsidy, or by increasing the availability of healthy food options in the setting.
- **Nutrition education.** Programs aiming to change the nutrition and/or lifestyle behaviors of employees through increasing employees' knowledge of healthy nutrition.
- **Nutrition-focused health check-ups.** Periodic one-to-one meetings with a health or nutrition professional to assess, and usually discuss, the employee's nutritional health.
- **Breastfeeding support.** Programs or company policies that enable working mothers to breastfeed exclusively for six months and continually for up to two years.

Workforce nutrition was featured as a key topic during the Nutrition for Growth (N4G) Summit in December 2021, where Google presented four new N4G commitments on nutrition. Meanwhile, the N4G's Business Constituency Group (BCG) – which consists of the World Business Council for Sustainable Development (WBCSD), Consumer Goods Forum (CGF), International Food & Beverage Alliance (IFBA), Food Industry Asia, and Nutrition Japan Public Private Platform (NJPPP), and was advised by GAIN and ATNI – launched a call to action for businesses to sign a Responsible Business Pledge for Better Nutrition and join the WNA.

## Supporting Breastfeeding Mothers

The US has one of the highest percentages of mothers with infants in the workforce (at 57%).<sup>155</sup> A lack of mother-friendly workplace policies compared to other countries has been identified as a key reason for the low rates of exclusive breastfeeding in the US (relative to other high-income countries).<sup>156</sup> According to the Office of the Surgeon General and the Centers for Disease Control and Prevention (CDC), women experience social stigma and practical difficulties when expressing milk in the workplace, due to poor breastfeeding facilities and inadequate maternal leave policies.<sup>157</sup>

Breastmilk is the ideal food for infants and one of the most effective ways to ensure child health and survival, while breastfeeding is also associated with health benefits for the mother.<sup>158</sup> The WHO and the United Nations Children's Fund (UNICEF) recommend that children be exclusively breastfed for the first six months of life. Given that longer parental leave is associated with a longer duration of breastfeeding,<sup>159</sup> the ILO recommends paid maternity leave of 14 weeks minimum, but ideally six months.<sup>160</sup> Aside from parental leave, breastfeeding can also be supported in the workplace by facilitating flexible working arrangements, as well as providing appropriate workplace lactation facilities to ensure mothers can continue breastfeeding when they return to work. The U.S. Breastfeeding Committee reports that investing in supporting breastfeeding mothers at work see returns on investment of 3:1, and breastfeeding-friendly workplaces are associated with higher retention of female workers.<sup>161</sup>

### **Box 1. The Workforce Nutrition Alliance (WNA)**

The WNA was launched by the Global Alliance for Improved Nutrition (GAIN) and the Consumer Goods Forum (CGF) in 2019 to drive momentum on this topic and support organizations in assessing, enhancing, and implementing their workforce nutrition programs. It has developed a range of [guidebooks and technical support programs](#), covering various aspects of workforce nutrition and advising how to develop such programs. The WNA also helps to facilitate partnerships with nutritionists and other technical partners.

To help organizations monitor, evaluate, and report on the rollout of their workforce nutrition programs and commitments, the alliance recently launched a self-assessment scorecard, [available free online](#).

Kellogg and Unilever are currently WNA signatories.

# Relevant Changes to the Methodology

- Greater alignment with the 'four pillars' of WNA: healthy food at work, nutrition education, nutrition-focused health checkups, and breastfeeding mothers at work.
- Criterion E3 on non-commercial consumer education and healthy eating programs has therefore been removed, to put greater emphasis on workforce nutrition programs and to reduce the emphasis on non-commercial programs.

# Key Findings

- The number of companies committing to support employee health and nutrition in the US remains similar to 2018, with eight of the 11 companies making some commitment to improving the health of their employees through programs designed to address nutrition. However, the scope of the workforce health and nutrition programs varies considerably.
- Only four companies report conducting some form of evaluation on the health impact of the workforce nutrition program in the US during the last three years.
- Six companies formally commit to both granting paid parental leave, and to providing appropriate working conditions and facilities to facilitate breastfeeding. Another five companies formally commit to granting paid parental leave only.

# Notable Examples



Unilever offers several programs that integrate nutrition to improve employee health, including the wider value chain. 'Lampighter' was the earliest health and well-being program, focusing on three main areas of exercise, nutrition, and mental resilience. Unilever also has a 'Health Improvement Program' (HIP), which utilizes a health risk assessment, clinical evaluation, and lab tests to define an individual health risk score. The company has also committed to working with the WNA's self-assessment 'scorecard,' committing to rolling it out and developing action plans in 70 manufacturing sites with on-site catering by 2026.

Further, Unilever's 'Global Maternal Wellbeing Standard,' launched in 2017, offers 16 weeks of paid leave, workplace facilities, and flexibility to support breastfeeding mothers. On its US website, the company states: "Unilever's family support for its United States employees includes: Inclusive paid parental leave for both mothers and fathers, fertility support, adoption assistance, state-of-the-art mothers' rooms and free milk shipments for nursing mothers, and back-up childcare option."



PepsiCo offers an employee wellbeing program called 'Healthy Living,' which is based on three pillars: Be Well, Find Balance, and Get Involved. Healthy eating is a key component of the 'Be Well' pillar, where free fruit is offered onsite and healthy food options are provided in cafeterias. Some locations offer nutrition advice and seminars to employees.



# E1. Supporting Employee Health and Nutrition

## Have companies improved their commitments to employee health and nutrition in the US, with a specific focus on nutrition?

The number of companies that commit to supporting employee health and nutrition in the US remains similar to 2018, with eight of the 11 companies making some commitment to improving the health of their employees through programs designed to address nutrition.

Of these, only four – Kellogg, Mars, PepsiCo, and Unilever – include measurable and verifiable expected outcomes. Meaningful expected outcomes must be quantifiable, but can be defined in various ways – e.g. by defining expected outcomes related to nutrition-related behavior, health-related outcomes, or outcomes related to employee workforce nutrition program participation. As an example, Kellogg sets personal health-related outcomes such as BMI, blood pressure, blood glucose, and LDL cholesterol for its program’s participants, while also seeking to achieve broader site-level expected outcomes such as improved performance at work, lower absenteeism, and improved people safety.

The scope of the workforce nutrition programs varies considerably: Kellogg, Mars, Nestlé, and Unilever were the only companies to demonstrate their programs are available to all company employees, while others limit the availability in some way. Six companies also make these programs available to some staff family members.

**Table 1. Company commitments for supporting employee health and nutrition**

	Company has a workforce nutrition program in the US			Company showed evidence of specific workforce nutrition elements in place			Company undertakes evaluation of program
	With expected outcomes	Available to all/ some employees	Available to all/ some family members	Healthy food at work	Nutrition education	Nutrition-focused health checks	
Campbell	-	-	-	-	-	-	-
Coca-Cola	-	-	-	-	-	-	-
Conagra	-	-	-	-	-	-	-
General Mills	-	◆	◆	-	-	-	-
Kellogg	●	◆	◆	●	●	●	●
KDP	-	◆	◆	-	-	●	-
Kraft Heinz	-	◆	-	-	-	●	-
Mars	●	◆	◆	-	●	-	●
Nestlé	-	◆	-	●	-	●	-
PepsiCo	●	◆	◆	●	●	●	●
Unilever	●	◆	◆	●	●	●	●

● Yes  
 ◆ All  
 ◇ Some  
 - No/no information

## How comprehensive are companies' workforce nutrition programs?

As previously stated, the WNA has delineated four 'pillars' of workforce nutrition programs. Given that breastfeeding support is covered in section E2 of this Index, the other pillars of healthy food at work, nutrition education, and nutrition health checks are covered in E1. As can be seen in Table 1, only three companies – Kellogg, PepsiCo, and Unilever – showed evidence of including these three elements in their programs.

**Noteworthy Example:** Unilever offers several programs that integrate nutrition to improve employee health, including the wider value chain. 'Lamplighter' was the earliest health and well-being program, focusing on three main areas of exercise, nutrition, and mental resilience. Unilever also has a 'Health Improvement Program' (HIP), which utilizes a health risk assessment, clinical evaluation, and lab tests to define an individual health risk score. The company has also committed to working with the WNA's self-assessment 'scorecard', committing to rolling it out and developing action plans in 70 manufacturing sites with on-site catering by 2026.

**Noteworthy Example:** PepsiCo offers an employee wellbeing program called 'Healthy Living,' which is based on three pillars: Be Well, Find Balance, and Get Involved. Healthy eating is a key component of the 'Be Well' pillar, where free fruit is offered onsite and healthy food options are provided in cafeterias. Some locations offer nutrition advice and seminars to employees.

### **Do companies increasingly conduct independent evaluations of the health impact of their workforce nutrition programs?**

Since 2018, improvement in this area has been limited. Only four companies report conducting some form of evaluation regarding the health impact of the workforce nutrition program in the US during the last three years. Of these, PepsiCo and Unilever are the only two companies to include measurable and verifiable expected outcomes.

None of the companies have published the results of their evaluation, even in summary form. No companies publish an independent evaluation of their workforce nutrition programs in full. Considering the importance of workforce nutrition programs for employee wellbeing, as well as for workers in the wider supply chain, companies can do a lot more to assess whether their programs are effective in delivering health outcomes.

### **Recommendations**

- Companies are encouraged to ensure they develop workforce nutrition programs that contain elements of the WNA pillars, including healthy food at work, nutrition education, and nutrition-related health check-ups where relevant. They should also define meaningful and quantifiable expected outcomes for their workforce nutrition programs – e.g. related to health-related behaviors, health-related outcomes, or outcomes related to employee participation. Becoming a signatory of the WNA and utilizing its self-assessment scorecards is a good first step in this regard (see Box 1).
- Companies are encouraged to make their workforce nutrition programs available to all employees, as well as where relevant employees' families, to maximize their accessibility and impact.
- Companies are advised to assess the effectiveness of their workforce nutrition programs by evaluating them using robust impact assessment tools and monitoring mechanisms (ideally carried out by a third-party independent evaluator), thereafter publishing the results for the purposes of sharing their learnings.
- Companies are also recommended to make a commitment to supporting the health and nutrition of workers across the wider food supply chain, both in the US and beyond, trying to reach the workers who would most benefit from such programs.

## E2. Supporting Breastfeeding Mothers at Work

### Have companies improved support for breastfeeding mothers and maternal health in the workplace?

Six companies formally commit to both granting paid parental leave, and to providing appropriate working conditions and facilities to facilitate breastfeeding at the workplace. Another five companies formally commit to granting paid parental leave only.

**Noteworthy Example:** Unilever’s ‘Global Maternal Wellbeing Standard,’ launched in 2017, offers 16 weeks of paid leave, workplace facilities, and flexibility to support breastfeeding mothers. On its US website, the company states: “Unilever’s family support for its United States employees includes: Inclusive paid parental leave for both mothers and fathers, fertility support, adoption assistance, state-of-the-art mothers’ rooms and free breast milk shipments for nursing mothers, and back-up childcare option.”

Several companies have extended their maternity and paternity leave since the previous US Index iteration. For example, General Mills has increased its maternity leave offer to 18 to 20 weeks, with the parental leave policy for fathers, partners, and adoptive parents at 12 weeks. Kellogg has extended paid parental leave for mothers and fathers to 12 weeks. Nestlé US has expanded the leave granted for primary caregivers from 14 to 18 weeks, as well as extending leave for the parent who is not designated as the primary caregiver from one week to up to four fully paid weeks. To optimally support mothers to breastfeed exclusively for the first six months, ATNI recommends that companies match paid leave for six months.

**Table 2: Company policies on paid parental leave**

	Less than 8 weeks	Between 8 and 14 weeks	Between 14 and 26 weeks	26 weeks or more
Campbell	-	●	-	-
Coca-Cola	-	●	-	-
Conagra	●	-	-	-
General Mills	-	-	●*	-
Kellogg	-	●*	-	-
KDP	●	-	-	-
Kraft Heinz	-	●*	-	-
Mars	-	-	●*	-
Nestlé	-	-	●*	-
PepsiCo	●*	-	-	-
Unilever	-	-	●	-

● Company showed evidence of provision  
 - No/no information

\*Extended commitment since last iteration

As shown in Table 2, and similar to the previous iteration, eight companies provided evidence of having arrangements in place to support breastfeeding mothers at work. These include offering private, hygienic rooms (seven companies); a refrigerator to store breast milk (five companies); breaks to express breastmilk (two companies); or other functional or flexible working arrangements (five companies). However, most companies have not formalized these commitments or were unable to provide supporting evidence of consistent implementation of these arrangements for all US employees.

**Table 3: Company maternity commitments and facilities**

	Private, hygienic rooms	Refrigerators to store breast milk	Breaks to express breast milk	Other functional or flexible working arrangements
Campbell	●	–	–	–
Coca-Cola	●	–	–	–
Conagra	–	–	●	●
General Mills	–	●	–	–
Kellogg	●	–	–	–
KDP	–	–	–	●
Kraft Heinz	●	–	–	–
Mars	–	●	–	–
Nestlé	–	●	●	–
PepsiCo	–	–	–	●
Unilever	–	●	●	–

● Company showed evidence of provision  
 – No/no information

\*Extended commitment since last iteration

Examples of other functional or flexible working arrangements include Kellogg's 'Milk Stork' service, which is "a breast milk delivery service to its employee benefits so nursing mothers can ship their breast milk back home in a safe, refrigerated, and convenient manner while they are away on business travel." Meanwhile, the Nestlé US Parental Support Policy webpage indicates that additional benefits are available, including "a free breast pump or a credit toward an upgraded breast pump (if desired), along with access to a lactation specialist and additional materials including books or nursing bras for breastfeeding mothers."

**Did companies improve public reporting on supporting breastfeeding mothers in the workplace?**

Compared to the US Index 2018, companies disclose more information on this topic, although disclosure remains limited overall. Four companies – Kellogg, Nestlé, PepsiCo, and Unilever – publish their policies on supporting breastfeeding mothers and paid parental leave. Seven companies publicly report on commitments to allowing parents to take parental leave.

**Recommendations**

- All companies are strongly encouraged to extend their parental leave policies – 14 weeks maternity leave at a minimum, but ideally going beyond current national guidelines to six months or more – to support the infant and maternal health of their employees.
- Companies are encouraged to develop a formal policy on extending support to breastfeeding mothers at work, applying equally in all facilities in the US and ensuring that this: 1) provides private, hygienic, safe rooms for expressing breast milk; 2) allows breastfeeding mothers breaks to express breast milk; and 3) offers flexible working arrangements to support breastfeeding mothers.
- Companies are recommended to increase transparency regarding the support extended to breastfeeding mothers at work by making the policy publicly available.



# Labeling

## Product labeling and use of health and nutrition claims

By providing comprehensive and easily understandable information about the nutritional composition and potential health impact of their products through labeling – both in-store and online – companies can help consumers choose the right products to contribute to healthy diets. As many back-of-pack (BOP) label elements and health and nutrition claims are regulated in the US, this section assesses practices on front-of-pack (FOP) labels, online information, and other ways of providing reliable and clear information to consumers.

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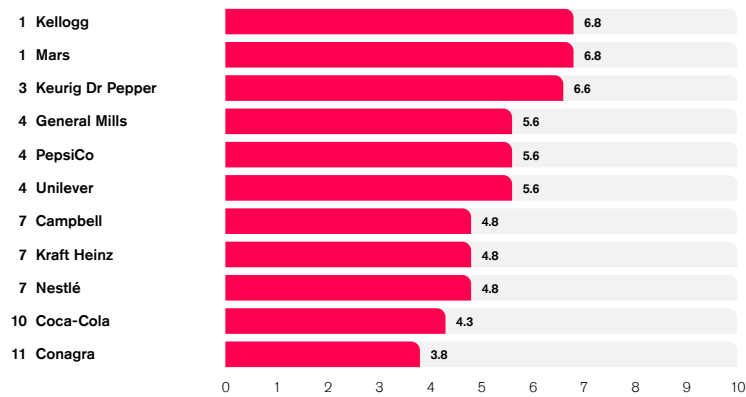
### Category F consists of one criterion:

#### F1 Product Labeling

#### To perform well in this category, companies should:

- Commit to using an interpretive front-of-pack (FOP) labeling system to assist consumers in making informed choices.
- Provide data to show that more than 80% of products display FOP nutrition labeling which shows, *at minimum*, % Daily Value (or similar measure) of selected nutrients.
- Display online nutrition information for products sold online to an equal or greater extent than that found on the physical product.
- If using on-pack images or making a claim on fruit and vegetable content, accurately display the amounts of fruits and vegetables contained in the product.
- On product labels, state the percentage of grains in the product that are wholegrains, where relevant.

# Ranking



**F1** Product labeling

Mars and Kellogg now score highest in the category, with 6.8, followed closely by KDP (6.6). Both Mars and Kellogg provide numerical FOP information for multiple nutrients per serving on 100% and 80% of their product labels respectively; and display online nutrition information for 96% of Mars Food products (and some Mars Wrigley products) and 100% of Kellogg's products. Both companies also provide evidence of disclosing information about grains that are whole grains on product labeling of some of their products.

# Category Context

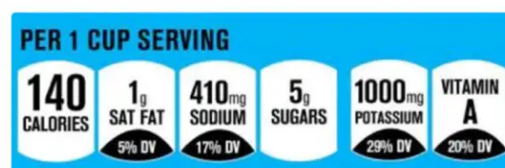
Research shows that FOP nutrition labeling on products plays a role in consumer choice – particularly when consumers are comparing the relative healthiness of products.<sup>162</sup> A FOP labeling system is considered to be more effective in helping consumers understand the healthiness of a product when it involves an ‘interpretive’ element, such as color-codes or symbols indicating whether a product scores “good” or “bad” on either individual nutrient criteria or summary criteria (such as NutriScore or Health Star Rating).<sup>163</sup> Interpretive labels make it easier for consumers to quickly and easily comprehend a product’s contribution to a healthy diet without requiring specific or sophisticated nutritional knowledge. The World Health Organization (WHO) recommends interpretive FOP labeling as a key policy strategy to support healthier food choices and to encourage product reformulation.<sup>164</sup> Ideally, FOP labeling systems should be standardized across a market, in order to avoid causing further confusion for consumers. Many different interpretive labeling systems have been developed, some of which are endorsed (and sometimes required) by other governments around the world.<sup>165</sup>

Back-of-pack (BOP) nutrition labeling, and health and nutrition claims are regulated in the US by the Food and Drug Administration (FDA) and USDA. In 2016, the FDA updated the mandatory BOP nutrition labelling format known as the Nutrition Facts label.

However, there are currently no requirements for FOP labeling in the US. That said, the National Strategy launched by the US Government in September 2022 includes a commitment to develop a standardized FOP label, although it is unclear at this point in time what the content of this label will include, whether it will be mandatory or voluntary, and when it will be released. In addition, the FDA will soon release an updated version of the definition of ‘healthy’ and criteria for the use of the term ‘healthy’ in nutrient content claims on food labels in the US.

In lieu of regulation, some US companies use a voluntary FOP labeling system called ‘Facts Up Front,’ developed in 2012 through a joint initiative of the Consumer Brands Association (formerly the Grocery Manufacturers Association) and the Food Marketing Institute. The format presents the information using numerical information only, as shown in Figure 1, which involves only a limited degree of interpretive assistance. An example of a voluntary interpretive labeling system used in parts of the US is the ‘Guiding Stars’ labeling scheme, developed in 2008 to help consumers easily choose the most nutritious foods.

**Figure 1. The ‘Facts Up Front’ label format**



The COVID-19 pandemic has caused an acceleration in the trend toward online purchasing of food groceries. New research has found that the quality of provision of nutrition information for online products has significantly lagged behind in this trend;<sup>166</sup> manufacturers and retailers have a responsibility to ensure nutrition information is easily accessible online. An interesting tool to assist in this regard is the SmartLabel;<sup>167</sup> developed in the US by the Consumer Brands Association in 2015, this is an online system that enables consumers to access nutrition information in a standardized format.

Beyond FOP labeling, research shows that consumers often lack adequate understanding of wholegrain claims and how they contribute to the healthiness of a product.<sup>168</sup> The Dietary Guidelines for Americans recommend that half of the daily grain intake should be wholegrains, yet Americans are currently failing to achieve this target in their diets.<sup>169</sup> Food companies can support consumers by labeling which proportion of the grains in products are whole. A carbohydrate-to-fiber ratio of less than 10:1 is one of the criteria used by the USDA to identify whole grains in a food product; a study by researchers at the Harvard School of Public Health found this to be the most effective measure of healthfulness of whole grain products.<sup>170</sup> Calculating the carbohydrate-to-fiber ratio may be difficult and not readily available for a consumer reading a label; therefore, labeling guidelines on wholegrain foods should be further improved.



# Relevant Changes to the Methodology

- New performance indicators (disclosing wholegrain content, and total amounts of fruits and vegetables) introduced based on stakeholder interests and potential regulations (Food Labeling Modernization Act 2021)
- The indicator assessing commitments to BOP labeling on total or added/free sugars has been deleted, given the updated US FDA regulation

# Key Findings

- All companies commit to listing some nutritional information FOP, and nine companies use percentage Daily Values (DV) (or a similar measure) for multiple nutrients. Six companies have implemented FOP labeling on more than 80% of products.
- However, limited progress was found regarding interpretive labeling systems, with no companies committing to implement one, even though several do so in other markets. Only Kellogg was found to support the 'Guiding Stars' system at point-of-sale (used by some retailers).
- While four companies provide some information about wholegrain content (relative to other grains) on product labels – including three using the Whole Grain Council's 'whole grain stamp' – none do so in a manner that captures the ratio of total carbohydrates-to-fiber for all relevant products. This would be the most effective way to inform consumers about the overall healthiness of a wholegrain-rich product.
- All companies display online information for some products, nine of which display this information for more than 80% of their product portfolio: a clear improvement from 2018.

# Notable Examples



Nestlé has been developing a 'GRAINSMART balance' system (in collaboration with Tufts University and other experts), whereby products with carbohydrates, fibers, and sugars that do not exceed a ratio of 10:1:2 can place a logo on-pack – thereby seeking to limit the amount of sugars and increase fiber content in such products.



# F1. Product Labeling

**Table 1. Companies' provision of FOP information in the US**

	What information does the company provide on FOP label?	Facts Up Front labeling	% products with FOP labeling
Campbell	●	✓	–
Coca-Cola	●	–	>80%
Conagra	●	✓	50-79%
General Mills	●	✓	50-79%
Kellogg	●	✓	>80%
KDP	●	–	>80%
Kraft Heinz	●	✓	50-79%
Mars	●	–	>80%
Nestlé	●	✓	>80%
PepsiCo	●	✓	50-79%
Unilever	●	✓	>80%

● % Daily Value (or similar measure) for multiple nutrients  
 ● Energy or caloric value only  
 ✓ Company provides information  
 – No/no information

## To what extent do companies commit to using FOP labels – and have companies implemented their commitments?

As of 2018, all 11 companies commit to putting some nutritional information on FOP – although the amount of information varies. Nine companies commit to displaying information as a percentage of Daily Values (DV) (or similar measure) of multiple nutrients, of which General Mills, Kellogg, Mars, Nestlé, Kraft Heinz, and Unilever use Facts Up Front. Two companies, Coca-Cola and KDP, display energy or caloric information on FOP.

It is encouraging that six companies now implement FOP labeling on more than 80% of products, with Kellogg and KDP now joining Mars, Nestlé, Coca-Cola, and Unilever in doing so. For Conagra, PepsiCo, and Kraft Heinz, the figure is between 50% and 79% – also an improvement since 2018 – while Campbell did not provide information.

However, none of the companies commit to using interpretive FOP labels, even though several of them commit to doing so in other markets. Kellogg states it is supportive of retailer programs such as the 'Guiding Stars' system, an interpretive labeling system used at point-of-sale, rather than on packages themselves.

## Do the companies provide information regarding wholegrains-to-refined grains ratios on product labels?

Only four companies were found to provide some information about wholegrain content (relative to other grains) on product labels for relevant products. Campbell, Mars, and PepsiCo, for example, use the 'whole grain stamp,' which was developed by the Whole Grain Council and can be placed FOP on products to indicate the percentage of grains that are wholegrain (50%, 75%, or 100%) for products with at least 8g of wholegrains per serving. Kellogg, meanwhile, has detailed internal requirements for placing wholegrain claims on FOP, including the requirement that, for products in which less than half of total grains are wholegrains, it must disclose the exact percentage of wholegrains.

While providing some information regarding wholegrain content, these approaches fall short of sufficiently capturing the relative balance of wholegrains vs. refined grains *and* sugars. A better approach in this regard is recommended by the American Heart Association, which classifies grain products as 'whole' if the ratio of total carbohydrate-to-fiber, each in grams per serving, was less than, or equal to, 10:1.

**Interesting example:** Nestlé has been developing a 'GRAINSMART balance' system (in collaboration with Tufts University and other experts), whereby products with carbohydrates, fibers, and sugars that do not exceed a ratio of 10:1:2 can place a logo on-pack – thereby seeking to limit the amount of sugars and increase fiber content in such products.

#### **Do the companies provide information regarding fruit and vegetable content on product labels?**

It is important that companies use truthful representations, depictions, or images of a product's ingredients on packaging: if fruits and vegetables are depicted, studies indicate consumers often interpret this to mean the product contains real fruits and vegetables, and that the product overall is healthier.<sup>171</sup> It is important, therefore, that companies only do so when a product does contain meaningful amounts of fruits and/or vegetables, and that they display the amounts used. In addition, companies should display the amount (as part of full servings) of 'nutrient-dense' ingredients derived from fruits and vegetables, meaning in whole, cut, dried, pulp, puree, 100% juice, or fully reconstituted concentrate form – and not concentrates, powders, or other ingredients. Four companies – Campbell, General Mills, Nestlé, and Unilever – demonstrated that is possible to provide this information by applying it on at least some products (although not all).

#### **How many companies provide nutrition information online?**

With online grocery sales increasing, it is important for companies to display nutrition information online to ensure it is as accessible as through the in-store purchasing of products. Encouragingly, nine companies were found to provide online nutrition information for more than 80% of products, including Conagra, Kraft Heinz, and Mars, who did not show this practice in 2018. Six of these companies (Conagra, General Mills, Kellogg, PepsiCo, Kraft Heinz, and Unilever) provide this information through the SmartLabel system. Coca-Cola and Nestlé provide information online for between 50% and 79% of their portfolio.

### **Recommendations**

To improve commitments and accelerate action on product labeling, ATNI encourages the food & beverage manufacturers assessed in this Index to consider the following recommendations:

- Companies are encouraged to support the FDA's efforts to develop an interpretive FOP system at the federal level that effectively communicates to consumers the healthiness of a product; they should not, however, push for a weak system, with minimum incentives for companies to use it. A mandatory system, for example, would level the playing-field for all companies' products.
- It is important that companies provide detailed nutrition information online for all products in the US to an equal or greater extent than on the physical product. Using the SmartLabel system, for example, is one approach to enhancing access to this information for consumers.
- All relevant companies should consider enhancing the information disclosed on-pack regarding wholegrains.
- Companies are advised to commit to using truthful representations, depictions, or images of fruits and vegetables used as ingredients. They are also advised to clearly display the amount of 'nutrient-dense' ingredients derived from positive food components, such as fruits and vegetables, fiber and wholegrains, contained on relevant product labels in the US, to provide consumers with a better understanding of the nutrient content and healthiness of these products.



# Engagement

## Influencing governments and policymakers and stakeholder engagement

**Category G focuses on companies' engagement with government bodies and representatives through lobbying, along with their stakeholder engagement with civil society and academia on nutrition-related issues. Companies are assessed on their management systems for lobbying, their efforts to support government legislation and regulation in the US, and their disclosure regarding their lobbying activities, contributions, and positions. Meanwhile, this category also assesses the extent to which companies engage with external stakeholders with established expertise in nutrition and public health, including civil society and academia, to improve their nutrition-related strategies and practices, ensuring they can contribute to addressing public health challenges.**

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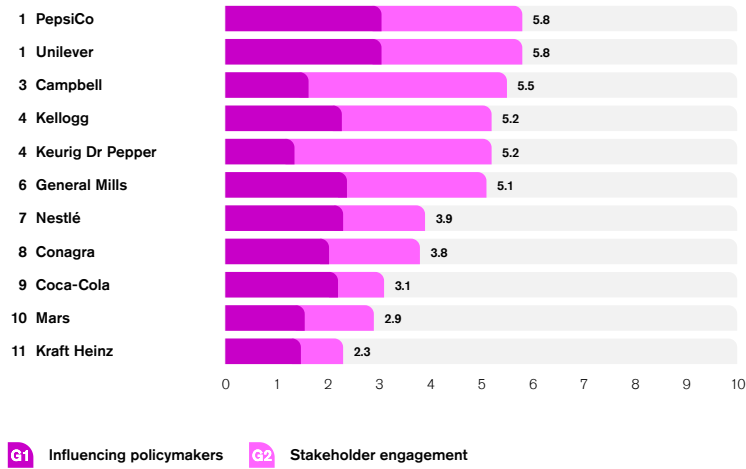
### **Category G consists of two criteria:**

- G1 Lobbying Policymakers and Government Bodies
- G2 Stakeholder Engagement

### **To perform well in this category, companies should:**

- Establish effective management systems for governing lobbying activities, such as board oversight, audits, and regular reviews of trade association memberships.
- Show evidence of lobbying in support of government policies to address malnutrition (including obesity and diet-related non-communicable diseases (NCDs)) and public health in the US.
- Disclose lobbying activities and positions relating to nutrition issues, membership of and financial support for industry associations, spending on lobbyists, and political donations.
- Show evidence of engaging a wide range of stakeholders in developing/updating their nutrition-related strategy, policies, and other activities.
- Disclose examples of nutrition-related stakeholder engagement, and how this has been used to adapt their nutrition-related strategy, policies, and other activities.

# Ranking



PepsiCo and Unilever achieve the highest scores of 5.8, demonstrating strong disclosure of lobbying expenditures and lobbying positions respectively. They also perform well on nutrition-related stakeholder engagement. Overall, companies showed improvement in Category G, the average score increasing from 3.5 to 4.4, with more companies disclosing information relating to lobbying and demonstrating more examples of nutrition-related stakeholder engagement.

# Category Context

## Lobbying

Government regulation plays a key role in changing the food environment and addressing public health challenges, including addressing obesity and diet-related NCDs. While these come in many different forms, the World Health Organization (WHO) has highlighted a range of priorities for governments, including fiscal measures to address obesity (such as taxes on sugar-sweetened beverages (SSB),<sup>172</sup> regulatory restrictions on marketing unhealthy products (to children),<sup>173</sup> and increased front-of-pack (FOP) labeling requirements).<sup>174</sup>

Some countries already have such policies in place. In the US, proposals have been made, but faced significant opposition – including from industry actors.<sup>175</sup> For example, in recent years, the American Beverage Association (ABA) has lobbied against SSB taxes at the federal level, as well as in California and other West Coast states.<sup>176</sup> This is despite growing evidence of the effectiveness of such taxes,<sup>177</sup> including from within the US: Philadelphia's tax on SSBs has led to a fall in sales of such beverages since 2017,<sup>178</sup> although it is currently in danger of being repealed.<sup>179</sup> Meanwhile mandatory FOP labeling has resurged on the agenda recently, with a taskforce of 26 food and health experts recommending the FDA develop a FOP labeling plan, and the Congressional Democrats introduced a bill that would require the FDA to create standardized, front-of-package labeling for all food that has a nutrition label.<sup>180</sup>

Given that such policies directly impact companies, these, too, have the right to be heard during the policymaking process. In the short run, such policies could bestow companies that are ahead of the curve on aspects of nutrition (such as formulation, marketing, or labeling) with a competitive advantage. Meanwhile, this would demonstrate their commitment to supporting public health, reducing reputational risk, and enhancing relationships with stakeholders – especially investors who are increasingly paying attention to companies' lobbying activities and the risks involved.<sup>181</sup>

Yet the risk that companies and their trade associations will lobby to promote interests inconsistent with the wider public health interest is well-documented.<sup>182</sup> It is therefore essential that companies conduct such lobbying activities responsibly, proportionately, with effective management systems in place, and with transparency – or not at all. To help facilitate this, ATNI was involved in developing the Responsible Lobbying Framework, which was launched in 2020: a free, sector-agnostic tool that sets out globally applicable principles, standards, and practical steps to ensure lobbying is conducted responsibly and serves the public interest. While the US has some of the most detailed lobbying disclosure requirements, by way of the Lobbying Disclosure Act, there are nevertheless many ways that companies can go beyond these to demonstrate their commitment to transparency and adequately facilitate scrutiny from stakeholders.

## Stakeholder Engagement

It is essential that companies – when designing, implementing, reviewing, and/or updating their nutrition-related strategies, policies, and other nutrition-related activities – engage with external stakeholders with established expertise and/or groups representing those particularly affected by the companies' products and practices (especially vulnerable groups) – they not only enhance their accountability to such stakeholders, but their insights can ensure that nutrition-related activities are sufficiently aligned with the public health interest. The AccountAbility AA1000 Stakeholder Engagement Standard offers a best practice framework for assessing, designing, implementing and communicating the quality of stakeholder engagement.<sup>183</sup>



It is also essential that companies are as transparent about such stakeholder engagement, being specific about whom they engaged (either on an individual level or the organizational affiliations), how they engaged, which topics were discussed, and what the outcomes were. While confidentiality is sometimes necessary to allow individuals to speak freely, companies should seek to disclose as much as possible with the consent of the relevant stakeholders. Moreover, anything that might generate a conflict of interest should also be disclosed, such as whether any compensation was involved. This transparency enables other stakeholders to determine for themselves the legitimacy of such engagement.

# Relevant changes in the methodology

- New indicator on management systems for lobbying, derived from the Responsible Lobbying Framework
- More weight on examples of lobbying in support of policy measures in the public health interest
- More detailed indicators regarding trade association memberships, political expenditures, and lobbying disclosure
- Greater alignment with the AccountAbility AA1000 Stakeholder Engagement Standard, as well as more emphasis on transparency regarding stakeholder engagement
- Indicator on quality of partnerships and third-party leadership for non-commercial consumer education and healthy eating programs (moved from E3).

# Key Findings

- While some companies provided examples of lobbying in support of government policies to address malnutrition in the US, none indicated that they had advocated for or lobbied in support of key WHO-endorsed policies – such as fiscal measures to address obesity, marketing restrictions for unhealthy products, or enhanced FOP labeling requirements – either at the federal, state, or municipal level – in the last three years.
- Most companies were very transparent about their political contributions (incl. via political action committees (PACs)) on their own domains and provide links to the Lobbying Disclosure Act (LDA) registries. However, very few go beyond mandatory disclosure on lobbying registries and are transparent about their state-level lobbying activity, the identities of lobbyists and lobbying firms they use, and the amounts they spend on lobbying in the US on their own domain. That said, PepsiCo's disclosure was found to be the most comprehensive in this regard.
- Most companies could also improve the comprehensiveness of their disclosure of trade association memberships, as well as disclosing the amount of membership dues spent on lobbying and any board seats they hold at these organizations, on their own domains.
- Clear disclosure regarding the companies' lobbying positions on important nutrition-related public health policies remains limited. That said, Unilever provides a positive example that other companies can seek to emulate, by providing details on when it would and would not support a range of policies.
- Encouragingly, all companies demonstrated some evidence of engaging with nutrition-related stakeholders in the US, the majority providing a wide range of examples and types: a noticeable improvement since 2018. Around half the companies demonstrated that they had done so specifically in relation to multiple different elements of their nutrition strategy and/or activities, engaging in direct, one-to-one consultations.
- Nevertheless, disclosure regarding stakeholder engagement lagged significantly behind performance. Companies were frequently vague in their public reporting as to which precise organizations or individuals they engaged, which topics were discussed, and what the outcomes of the engagement were. Moreover, information regarding any compensation involved was largely absent. Together, this prevents external scrutiny of the quality and legitimacy of the stakeholder engagements the companies have carried out.

# Notable Examples



KDP reports that it engages with external, credentialed experts in public health, nutrition, fitness, mindfulness, and academia, as well as the Partnership for Healthier America and other public health-oriented civil society organizations, to help shape its nutrition-related activities. This includes the development of its 'Positive Hydration' strategy and discussing the marketing of its beverages.



General Mills provides hyperlinks directly to several of its policy consultation comments and letters to policymakers on its website,<sup>184</sup> a practice also demonstrated by the Sustainable Food Policy Alliance.<sup>185</sup>



Unilever publishes a relatively comprehensive range of 'Advocacy and Policy Asks' on its website.<sup>186</sup> Moreover, in its 'Position on Sugar' and 'Position on Nutrition Labeling' documents, the company provides additional detail, publicly specifying under which conditions the company would support (or not support) certain policies.<sup>187</sup>



PepsiCo highlighted its lobbying efforts with the ABA and state-level trade associations in support of legislation in Chicago, New York City, and Ohio to support healthier 'default' beverage options for children's meals at restaurants,<sup>188</sup> an acknowledged intervention to help address childhood obesity.<sup>189</sup>



Nestlé states that it regularly reviews its memberships and that it will withdraw if "Nestlé is regularly in opposition with the positions/agendas of the organization (this includes inappropriate lobbying practices); the organization has not delivered the outcome expected for many years; weak governance putting at risk Nestlé's reputation; [or] the evolution of the membership of the organization is not in alignment with Nestlé's agenda, values, and principles."



# G1. Responsible Lobbying

## **Do companies have management systems in place to monitor and ensure alignment between their lobbying activities and their core commitments, policies, and codes of conduct?**

Encouragingly, all but three companies have assigned to their board oversight of their lobbying policy, positions, and practices. Moreover, all but three state that they conduct regular reviews of their trade association memberships to monitor their public policy positions and activities, and ensure alignment with the company's policies and/or positions.

**Notable Example:** Nestlé states that it regularly reviews its memberships and that it will withdraw if “Nestlé is regularly in opposition with the positions/agendas of the organization (this includes inappropriate lobbying practices); the organization has not delivered the outcome expected for many years; weak governance putting at risk Nestlé’s reputation; [or] the evolution of the membership of the organization is not in alignment with Nestlé’s agenda, values, and principles.” For example, at the end of 2017, the company withdrew from the Grocery Manufacturers Association (see Box 1).

However, only two companies were found to carry out internal audits of their lobbying activities and disclosure: General Mills indicates that it audits compliance with its Civic Policy and the accuracy of its disclosure, while Kraft Heinz “partners with outside counsel to conduct an internal audit of all lobbying practices and reporting.”

## **Do companies show evidence of lobbying in support of government policies to address malnutrition (including obesity and diet-related NCDs) and public health in the US?**

Six companies (Mars, Unilever, Nestlé, General Mills, Kellogg, and PepsiCo) provided evidence of supporting policies to address malnutrition (incl. obesity and diet-related NCDs) and public health in the US in the last three years.

**Notable Example:** PepsiCo highlighted its lobbying efforts with the ABA (American Beverage Association) and state-level trade associations in support of legislation in Chicago, New York City, and Ohio to support healthier ‘default’ beverage options for children’s meals at restaurants,<sup>190</sup> an acknowledged intervention to help address childhood obesity.<sup>191</sup> Moreover, throughout the COVID-19 pandemic, most companies were active in advocating for increased flexibilities in USDA food and nutrition programs to extend access to the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), school lunch and breakfast programs, and Supplemental Nutrition Assistance Program (SNAP) for food-insecure families and children. It should be noted that sales of products through these programs comprise substantial revenues for food and beverage manufacturers.

Companies did not provide any clear examples of lobbying in support of fiscal measures to address obesity, regulatory restrictions on marketing/advertising unhealthy products (to children), or increased FOP labeling requirements, whether at the federal, state, or local level – despite these being key policy measures endorsed by the WHO to address obesity and diet-related NCDs.<sup>192</sup> However, ATNI did find evidence of some companies and their trade associations lobbying against such measures in the LDA database, e.g. the ABA against SSB taxes in 2021,<sup>193</sup> while similar activities have been reported in California.<sup>194</sup>

## How much information do companies disclose on their own domains in relation to lobbying, beyond legal requirements?

### Trade Associations

Since legislation affects companies collectively, lobbying is often undertaken by trade associations on their behalf. However, this can obscure which companies' interests are being represented in lobbying, as well as removing direct responsibility for these companies for the associations' actions. Therefore, to enhance accountability, companies must be transparent about their trade association memberships and levels of involvement in them.

Only five companies disclose their trade association memberships in the US to a reasonable level of comprehensiveness: Conagra, Campbell, KDP, Kellogg, and Unilever. The others either only disclose memberships to which it pays dues over a relatively high threshold (e.g. > USD 20,000), or only provide an indicative list without explanation. Moreover, only four companies (Conagra, Campbell, General Mills, and Kraft Heinz) disclose the precise amount of their membership dues that are used for lobbying purposes. Meanwhile, since 2018, Kellogg, Unilever, and Nestlé have started indicating which trade associations they hold board seats on, alongside Mars, which was found to do so in 2018.

**Table 1. Disclosure relating to trade association memberships in the US**

	Company discloses comprehensive list of trade association memberships in the US	Company discloses dues used for lobbying purposes by its trade associations	Company discloses its board seats in trade associations
Campbell	●	●	-
Coca-Cola	-	-	-
Conagra	●	●	-
General Mills	-	●	-
Kellogg	●	-	●
KDP	●	-	-
Kraft Heinz	●	●	-
Mars	-	-	●
Nestlé	-	-	●
PepsiCo	-	-	-
Unilever	●	-	●

● Yes  
- No/no information

### Political Contributions

Another means of influencing policymakers is through political finance contributions, which are made either directly from the company's treasury (for state and local candidates only) or indirectly via PACs. Many companies also have 'employee PACs' that use funds contributed by the companies' executives, shareholders, lobbyists and their families, as well as their staff. The PACs are able to donate to candidates at a federal level and can therefore be highly influential. Nestlé, Unilever, and Mars have policies in place to prohibit any such donations in the US.

There are regulations around whether and how companies can make political contributions in the US, as well as stringent disclosure requirements on the [Federal Election Committee \(FEC\) registry](#). Nevertheless, many companies go beyond mandatory disclosure and demonstrate commitment to transparency by publishing detailed information about their political contributions on their own domains. Encouragingly, all companies (except Kraft Heinz) were found to publish comprehensive information about their political contributions from their company treasury. Regarding contributions from ‘employee PACs,’ only Coca-Cola, Kraft Heinz, PepsiCo, and Conagra published detailed information about their activities; General Mills, KDP, and Kellogg only publish the name of the employee PAC, while Campbell recently dissolved theirs, but did not publish information about its recent activities.

### Lobbyists and Lobbying Firms

While companies are required by law in the US to disclose basic information about their lobbying activities on public registries at the federal level and in most states, they can still go beyond this and demonstrate their commitment to transparency by publishing this information on their own domains, along with additional information not captured by mandatory disclosure. At a basic level, all but two companies provide hyperlinks to one of the searchable LDA websites on their public domain. Coca-Cola goes even further, publishing its quarterly lobbying reports directly on its website.

General Mills, meanwhile, also provides hyperlinks for the lobbying registries of the two states which it lobbies in, while PepsiCo indicates the states in which its lobbyists are active; no other companies indicate in which states they actively lobby. Given that state-level policymaking is also an important arena for lobbying – with public health policies at this level affecting millions of people – it is important that companies are also transparent about their lobbying activities below the federal level. Disclosing which states they actively lobby in is a good first step: it saves interested stakeholders the significant labor involved in checking each state register manually.

Moreover, only four companies (PepsiCo, Coca-Cola, Nestlé, and Campbell) publish the total amounts spent on lobbying in the US each year on their own domains. PepsiCo, meanwhile, is the only company to disclose the names of the lobbyists and lobbying firms it contracts, both at federal and state levels. While this is a mandatory requirement for lobbying registries, publishing on its own domain enhances transparency by enabling stakeholders to recognize and scrutinize the third-party actors lobbying on behalf of the company more easily.

**Table 2. Disclosure relating to lobbying activity and expenditure**

	Company indicates which states it actively lobbies in	Company provides a hyperlink to its LDA reports	Company discloses annual lobbying expenditure in US	Company discloses names of its lobbyists / lobbying firms
Campbell	-	-	●	-
Coca-Cola	-	●	●	●
Conagra	-	●	-	-
General Mills	●	●	-	-
Kellogg	-	-	-	-
KDP	-	●	-	-
Kraft Heinz	-	●	-	-
Mars	-	●	-	-
Nestlé	-	●	●	-
PepsiCo	●	●	●	●
Unilever	-	●	-	-

● Yes  
- No/no information

### Lobbying Positions on Key Nutrition-Related Policies

It is crucial that companies disclose their lobbying positions for key nutrition-related policies, as this helps to ensure consistency in the company's lobbying activities (incl. via trade associations) and is key to enhancing accountability. Important policy positions that ATNI encourages a company to disclose on include the aforementioned WHO-endorsed measures: fiscal measures to address obesity, restrictions on marketing to children, and mandatory FOP labeling requirements.

Generally, disclosure on these topics was very low among the companies assessed. While some companies, such as Nestlé and Kellogg, disclose lists of topics on which they are active in lobbying, they do not disclose their specific positions or use ambiguous language in doing so. PepsiCo and Coca-Cola indicate that they oppose SSB taxation to address obesity (but are transparent about doing so). Meanwhile, Campbell and PepsiCo indicate a clear preference for self-regulation with regard to marketing to children, rather than government regulation.

**Notable Example:** An exception is Unilever, which now publishes a range of 'Advocacy and Policy Asks' on its website, including each of the measures listed above.<sup>195</sup> Moreover, in its 'Position on Sugar' and 'Position on Nutrition Labeling' documents, the company provides additional detail, publicly specifying under which conditions the company would support (or not support) certain policies.<sup>196</sup>

**Notable Example:** Also worth highlighting is General Mills, which provides hyperlinks directly to several of its policy consultation comments and letters to policymakers on its website,<sup>197</sup> a practice also demonstrated by the SFPA.<sup>198</sup>

### Recommendations

- Most companies could strengthen their lobbying management systems by conducting internal and/or independent third-party audits of their lobbying activities and disclosure to ensure alignment with their policies and/or codes of conduct.
- Companies are encouraged to actively support (or commit to not lobby against) public policy measures in the US to benefit public health and address obesity, including those endorsed by the WHO.
- Companies are encouraged to ensure that their disclosure of trade association memberships in the US is as comprehensive as possible, including the specific dues paid that are used for lobbying purposes and any board seats held at these organizations.
- To further enhance transparency and go beyond LDA requirements, companies are encouraged to publish comprehensive lobbying information on their own domains, rather than only on public registries. Notably, they could significantly improve their disclosure regarding the states in which they lobby, the names of lobbyists and lobbying firms they use, and the amounts they spend on lobbying in the US.
- Almost all companies could significantly improve their disclosure regarding lobbying positions on key public health policies that would affect the industry. These positions should be as specific and unambiguous as possible, including conditions and provisions if necessary, as per Unilever's example. Publishing links to specific documents used in government engagements is also encouraged.



### **Box 1. Sustainable Food Policy Alliance (SFPA)**

Toward the end of 2017, the US divisions of Nestlé, Unilever, and Mars left the Grocery Manufacturers Association (GMA, currently known as the Consumer Brands Association (CBA)) – a powerful industry lobbying group – amid disagreements over policy positions on nutrition-related topics such as labeling.<sup>199</sup> In 2018, together with Danone North America, these companies established a new advocacy group, the Sustainable Food Policy Alliance (SFPA). Concerned about the “continued rise in obesity rates and other chronic diseases such as diabetes and heart disease, as well as food insecurity and access to healthy food in the US,” the group is “committed to developing and advocating for policies that help people make better-informed food choices that contribute to healthy eating while supporting a sustainable environment.”<sup>200</sup>

Examples of legislative and regulatory issues it lobbies on include efforts to reduce dietary sodium and added sugar in consumers’ diets, updating definitions of terms like ‘healthy,’ and encouraging timely implementation of the new nutrition facts panel. The group has no permanent staff; activities are undertaken by employees of the companies themselves.

# G2. Stakeholder Engagement

## Do companies show evidence of engaging with a wide range of nutrition-related stakeholders regarding their nutrition strategy, policies, and programs?

Encouragingly, all companies were able to show some evidence of engaging with nutrition-related stakeholders in the US, such as civil society organizations, academic/scientific institutions, or government bodies, on their commercial nutrition strategies and activities – whereas only six did so in 2018. Moreover, eight companies did so with a wide range of stakeholders; only Coca-Cola, Kraft Heinz, and Conagra were more limited.

**Table 3. Stakeholder groups company showed evidence of engaging with on nutrition-related topics**

	Individual experts in nutrition	Civil society organizations (CSOs)	Academic institutions / scientific bodies	Multi-stakeholder platforms	Advisory committee
Campbell	●	–	●	●	–
Coca-Cola	–	–	–	●	–
Conagra	–	–	–	–	●
General Mills	–	–	–	●	●
Kellogg	●	●	●	–	–
KDP	●	●	●	–	–
Kraft Heinz	–	–	–	●	–
Mars	–	–	–	●	–
Nestlé	–	–	–	●	–
PepsiCo	–	●	●	●	–
Unilever	●	–	–	●	–

● Yes  
– No/no information

This stakeholder engagement takes a variety of different forms. On one hand, Campbell, Kellogg, KDP, PepsiCo, and Unilever each indicated that they undertook targeted one-on-one consultations with external stakeholder groups who have relevant expertise regarding specific aspects of their nutrition-related activities.

**Notable example:** KDP now reports that it engages with external, credentialed experts in public health, nutrition, fitness, mindfulness, and academia, as well as the Partnership for Healthier America and other public health-oriented civil society organizations, to help shape its nutrition-related activities. This includes the development of its ‘Positive Hydration’ strategy and discussing the marketing of its beverages.

In addition, most companies (Mars, Nestlé, and General Mills in particular) indicate they engage with other stakeholders via membership in multistakeholder initiatives, such as the Portion Balance Coalition; the National Academies of Sciences, Engineering, and Medicine (NASEM)/Institute of Medicine (IOM) Food Forum; Obesity Roundtable; and Tufts University Food and Nutrition Innovation Council – all of which serve as platforms for convening stakeholders with different perspectives and for sharing information.

Campbell, Kellogg, KDP, and PepsiCo each showed that they engaged stakeholders on multiple different aspects of their nutrition strategies, policies, and programs. KDP, for example, developed its 'Positive Hydration' strategy with the help of Partnership for a Healthier America (PHA). It also showed evidence of discussing the marketing of its carbonated drinks with the Center for Science in the Public Interest (CSPI) and its health and wellbeing strategy with a group of environmental, social, and corporate governance (ESG)-focused investors. Campbell, meanwhile, states that it engaged with external nutrition experts regarding its nutrition strategy, the new Nutrition Metrics and 'Nutrition Focused Foods' profiling system. Similarly, Kellogg states that it consulted AHA, expert dieticians, and scientists in the development of both updated Kellogg Global Nutrient Criteria and its Childhood Wellbeing Promise.

The remaining companies, however, either only provided one specific example (General Mills and Unilever) or were less specific about the nature and content of these engagements. This is especially the case for those relying predominantly on engagement via multistakeholder platforms and initiatives, relative to those with clear one-to-one engagement.

**Table 4. Subjects of companies' nutrition-related stakeholder engagement**

	Commercial nutrition strategy	Nutrition-related policies / programs	Examples
Campbell	●	●	New Nutrition Metrics; 'Nutrition Focused Foods' NPS
Coca-Cola	-	-	-
Conagra	●	●	Nutrition strategy, product development
General Mills	●	-	Nutrition strategy
Kellogg	●	●	Wellbeing strategy; Kellogg Childhood Wellbeing Promise; Kellogg Global Nutrition Criteria 2.0
KDP	-	-	-
Kraft Heinz	●	●	'Positive Hydration' strategy, marketing
Mars	-	-	-
Nestlé	-	-	-
PepsiCo	●	●	Pep+ nutrition strategy, product development, marketing/distribution, advocacy priorities
Unilever	-	●	Highest Nutritional Standards

● Yes  
- No/no information

### How much information do companies disclose about their stakeholder engagement?

While the level and quality of engagement have certainly improved since 2018, disclosure regarding these engagements has lagged significantly. No companies were found to publicly disclose the full range of stakeholders they engaged by name, either at an organizational or individual level. This is essential for transparency and accountability purposes. While companies tend to publicly state that they conduct systematic stakeholder engagement, very often they only publicly reference broad categories of stakeholders without specifying their identities. This prevents scrutiny regarding the relevance and legitimacy of these stakeholders and, therefore, of the engagement itself.

Another key aspect of disclosure missing is the financial element: whether or not (and to what extent) the engagement involved some form of compensation for the external expert's time, or whether an organization or initiative engaged receives sponsorship or other funding from the company. This is concerning, since the bias-inducing impact of compensation and sponsorship is well-documented.<sup>201</sup> It is not unreasonable to expect an expert's time to be compensated or an organization to be supported in exchange for access to its expertise. Nevertheless, it is important to disclose information about such transactions to enable stakeholders to decide for themselves the extent to which these are proportionate and legitimate.

A third aspect of disclosure found to be lacking are the details of the content of the company's engagements. Only three companies (Kellogg, Campbell, and KDP) publicly report which specific aspects of their activities were the subject of their stakeholder engagements. Moreover, almost no companies publicly report the outcomes of their engagements or how their practices were adapted as a result; those that do only do so in broad terms, lacking specifics.

### **Do companies primarily support or fund non-commercial nutrition education programs designed and implemented by (or in partnership with) organizations with relevant expertise?**

While large companies have the advantages of considerable resources and wide consumer reach, there are nevertheless sensitivities involved with private, for-profit companies engaging in nutrition education campaigns. It is essential that those who choose to do so only support those designed and implemented by independent stakeholders with relevant expertise – or involve them heavily in the process – and ensure that they are aligned with public sector guidance (such as the Dietary Guidelines for Americans).

Campbell, General Mills, Unilever, and Conagra each showed that they only support such programs. General Mills' projects in Minneapolis and Buffalo, which involve "health services and food and wellness education" and "culinary and food skills training for youth," are designed by two local United Way organizations, while also providing grants to independent non-profits active in these areas. Meanwhile, Campbell's new 'Full Futures' program sees different partner organizations run different parts of the program: 'The Food Bank of South Jersey' provides nutrition education to students and parents, two youth advisory councils advise on the 'Full Futures' work, and the 'Alliance for a Healthier Generation' leads the measurement and evaluation work.

The remaining companies all run a mix of programs designed by themselves and external groups, while Kraft Heinz states that it does not engage in any such activities in the US.

### **Recommendations**

- Companies should ensure that – in the process of developing a new nutrition strategy, policy, or other nutrition-related activity, or when updating or reviewing an existing one – they engage directly with a range of stakeholders, such as civil society organizations, academic institutions, and scientific bodies with recognized expertise in nutrition and public health.
- All companies could significantly improve their transparency regarding which specific stakeholders they engage with and the identities (or, at minimum, affiliations) of experts they have consulted, as far as possible. In addition, the degree of financial compensation for these engagements should be disclosed.
- All companies are encouraged to improve the public reporting of the topics of discussions during stakeholder engagements, along with which aspects of the company's nutrition-related activities are being discussed. Importantly, companies should also be clear about the outcomes of the engagement, and if and how they were used to change their practices or plans.
- Companies that choose to support consumer nutrition education are encouraged to ensure that such programs are designed and/or implemented by independent groups with recognized expertise, and that they are aligned with public sector guidance (such as the Dietary Guidelines for Americans).

# Amplifying Impact

Companies urgently need to deliver on the Sustainable Development Goals



**End hunger, achieve food security and improved nutrition**



**Ensure healthy lives and promote well-being for all**

ATNI encourages all stakeholders to actively use the US Index 2022 results and provide their feedback to ATNI. We hope that the rated companies will commit to make changes based on our recommendations and that their investors will use them in their engagement with those companies to press for improvements in their policies, practices and disclosure. Further, we hope that governments and policymakers, NGOs, academics and others are able to use our analysis and findings in their work to encourage better diets in the US.

## Acknowledgements

The US Access to Nutrition Index (ATNI) 2022 would not have been possible without the generous support of the Robert Wood Johnson Foundation (RWJF). This report was produced by the US Index team, consisting of: Babs Ates, Elena Schmider, Estefania Marti Malvido, Laura Trijsburg, Lucy Cosenza, Mali Gravell, Mark Wijne, Nadine Nasser, Sameea Sheikh, and Will Sharp. The ATNI team drew on the expertise and advice of the ATNI US Index Expert Group (Linda Meyers, Mary Story, Mike Rayner, Shiriki Kumanyika, Terry Huang), ATNI consultant Amanda Berhaupt-Glickstein and other public health and subject specialists – Jennifer Harris, Nancy Roman, and Vivica Kraak – whose close engagement throughout the ATNI development process has been a source of invaluable guidance. This report benefited greatly from their input. The views expressed in this report, however, do not necessarily reflect the views of the group's members or their institution. ATNI would also like to thank our partners Dr. Elizabeth Dunford from The George Institute for Global Health for research, Kummer & Herman and Studio September for design, Wren Media for editing, and Burness for communications.

# Annex US Index 2022

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# ATNI US Expert Group

The function of the Access to Nutrition Initiative US Expert Group is to provide input into the development of the company assessment methodology and to review the analysis and Index report. This group consists of members with expertise in various aspects of nutrition (including both undernutrition and obesity and diet-related chronic diseases) and the role of the food and beverage industry when it comes to nutrition.

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## Footnotes

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63. ATNI uses the term healthier and 'healthy' to encourage companies to get to healthier portfolios by increasing nutritional quality at the portfolio, category and product levels. We use the threshold of HSR 3.5 stars or over to classify portfolios or products as generally healthy. That is not to say that HSR is the only or best way to measure healthiness of products or portfolios. ATNI recognizes that companies use different criteria and models; ATNI assesses the robustness of these criteria and models (see section B3 on Nutrient Profiling Models). ATNI also wants to encourage and credit making products or product categories that are inherently less healthy and will never meet all healthiness criteria (like confectionary, snacks, ice cream) healthier to better fit in a healthy eating pattern. ATNI also recognizes all the limitations of categorizing a product as generally healthy (depending on quantities, portions eaten, what products are eaten with, how they fit in people's meals and diets etc.). This is why throughout this report we intentionally use the term healthier or 'healthy' (with the quotation marks).
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79. The threshold of 3.5 or above ( $\geq 3.5$  HSR) is based on work commissioned by the New South Wales Ministry of Health in Australia, which concluded that “healthy core foods with a HSR of  $\geq 3.5$  can be confidently promoted in public settings as healthier choices.” Reference: Dunford, E., Cobcroft, M., Thomas, M., Wu, J.H. (2015). Technical Report: Alignment of the NSW Healthy Food Provision Policy with the Health Star Rating System. Available at: <http://www.health.nsw.gov.au/health/Publications/health-star-rating-system.pdf>. (Accessed: 10/06/2022).
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148. Companies are expected to commit not only to comply with local laws and regulations, but to go further and uphold their policies in full in all markets where legal measures are weaker than the Code, or where they are absent altogether.
149. All BMS companies were addressed by a BMS Call to Action issued in June 2020 by WHO, UNICEF, and several non-governmental organizations, which urged companies to publicly acknowledge the Code and to commit to delivering full Code compliance by 2030 at the latest.
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