WORLD'S BIGGEST FOOD MANUFACTURERS OVER RELIANT ON SALES OF UNHEALTHY FOODS

Introduction

Major multinational players such as Nestle, Danone, Kellogg's, Kraft Heinz and Unilever often position themselves as global leaders in improving the healthfulness of their food and drinks, but just how 'healthy' are their portfolios, and according to what standards?

Front of pack labelling is a recognised tool to measure the healthfulness of products. Countries and regions have developed their own models, including Nutri-Score (NS) in Europe, the Health Star Rating (HSR) in Australia and New Zealand, and Warning Labels (WL) in Latin America. Despite these recognised tools, multinational corporations often develop their own internal models to measure healthfulness. This makes it difficult to scrutinise their product portfolio more closely.

In July 2022, Action on Salt assessed the nutritional quality of flagship products available in the UK market for 5 global food businesses; Danone, Kellogg's, Kraft Heinz, Nestle & Unilever [1]. Up to 100 products were assessed against the UK nutrient profiling model finding that over half of these manufacturers' 'flagship' products were unhealthy, or high in fat, salt and/or sugar (HFSS). Despite regulatory action to boost nutrition and growing public demand for healthier foods, manufacturers globally continue to fall behind others in setting meaningful targets to improve nutrition.

Building on this, we have expanded the research to assess the nutritional quality of food and drink in different countries against their respective front of pack labelling models.

Research Overview

We collected data on front of pack labelling for food and drink produced and manufactured by five companies (Nestle, Danone, Kellogg's, Kraft Heinz and Unilever) in three countries (France, Australia and Mexico) in September and October 2022. The companies were selected as the world's largest food manufacturers, and the countries as their production hubs.

Government Endorsed Models

The healthiness of the products was measured against three major government-endorsed front of pack labelling models to gain a comprehensive understanding of the full product portfolios of these companies against a range of models.

Health Star Rating

Health Star Rating (HSR) is a joint Australian and New Zealand Government initiative developed in collaboration with the food and drink industry, public health and consumer groups. HSR has been in operation on a voluntary basis since June 2014 [2].

HSR rates the overall nutritional profile of packaged food based on total energy, saturated fat, salt and sugar content, as well as fibre, protein and fruit, vegetable, nut and legume content. Based on this information, food and drink products are assigned a rating from ½ a star (least healthy to 5 stars (most healthy).

Nutri-Score

Nutri-Score (NS) is a front of pack label based on the UK's Nutrient Profiling Model. The score for a given food or drink is calculated by allocating points for the content per 100 g (100ml for drink) of energy, saturated fat, sugars, salt, fibre, and proteins, fruits, vegetables, legumes, and nuts.

The scores are displayed using 5 different colours to classify foods into 5 categories: category A (dark green) indicating a higher nutritional quality to category E (dark orange) indicating lower nutritional quality [3]. Products sold in France typically use NS, but is a voluntary approach and therefore is not widely used across all food and drink products.

Warning Labels

Many Latin American countries have been implementing front of pack nutrition warning labels over the last decade, with Chile being the first in 2016 [4]. These include octagonal warning labels on front of pack indicating if a product is high in calories, saturated fat, sugars and salt. In March 2020, Mexico implemented a new mandatory warning label system based on the Latin American WL, with 5 warning octagons on front of pack for food and drink high in calories, saturated fat, trans fat, sugars and salt [5].

Data Sourcing

Product information was obtained online through company websites and key retailers' sites. Processed food and drink sold in retail, with available nutrition information were included in this dataset (see Table 1 for more detail).

Table 1. Inclusion and exclusion criteria for product selection

Inclusion criteria	Exclusion criteria
- Ambient, chilled and frozen food/drink - Cooking ingredients - Complete meals - Displayed on company websites - Available in retail - Nutritional information available	- Products with no nutrition information displayed - Seasonal products e.g. Easter eggs - Limited edition products - Coffee pods and instant coffee - Unprocessed waters (unflavoured) - Unprocessed fresh meat products - Infant foods, including follow on milk powders - Product duplicates per country

Company websites for Mexico and France, were the primary source of information for data collection, but where nutrient profiling scores or nutrition information were not provided, the major retailers in respective countries were utilised. In the absence of a nutrient profiling score, this was calculated using the products available nutrition information.

For Australia, where available information online was limited, data from The George Institute for Global Health's global database of food and drink products was utilised.

Data Verification

Data was shared with the respective companies ahead of publication for verification of the data and all companies except for Kraft Heinz provided feedback. Unilever encouraged the use of their published data for this report [6], however, their dataset included products which did not align with our methodology. In the absence of raw data, we were unable to incorporate their report to our research.

Defining 'Healthy'

In order to comment on the healthfulness of products sold by these key food and drink companies, a definition of what would be deemed as healthy/less healthy under these differing front of pack labelling models was developed. This definition is used elsewhere in the literature [7].

- France: Under the NS, products are graded with a letter from A being the healthiest, to E. They also have corresponding colours from green to amber and then red. If a product contained a NS letter C-E and amber or red colours, then this was deemed less healthy.
- Mexico: if a product contained at least one WL for calories, saturated fat, sugars and or salt, then this was deemed less healthy.
- Australia: if a product contained a HSR less than 3.5, then this was deemed less healthy.

Results

A total of 2,346 products with available nutrient profiling scores was collected.

Table 2. Total number of products

Manufacturer	Danone	Kellogg's	Kraft Heinz	Nestle	Unilever	Total
Australia	39	87	133	326	227	**812**
France	194	64	55	395	269	**977**
Mexico	104	146	11	236	60	**557**

Danone was the only manufacturer with a greater share of healthier products available in each of the three countries. The remaining four manufacturers performed poorly across all three markets, despite all of them claiming to be active in improving the healthfulness of their products.

Out of the 2,346 products analysed, the highest proportion of unhealthy products was in Australia with 65%, compared to 63% in France and 60% in Mexico (See Table 3)..

Kraft Heinz's food range was the least healthy in Mexico and France, with all 11 products in Mexico and 51 products (93%) in France classified as unhealthy.

WASSH

Table 3. Proportion of products below standard definition of 'healthy', based on respective front of pack labelling models

Manufacturer	Danone	Kellogg's	Kraft Heinz	Nestle	Unilever	Total
Australia	18%	67%	61%	68%	69%	**65%**
France	31%	83%	93%	65%	71%	**63%**
Mexico	49%	91%	100%	51%	28%	**60%**
Overall Company Score	35%	72%	82%	62%	66%	**63%**

Conclusion

Improving the nutritional content of food and drink by reformulating recipes with less salt, sugar and saturated fat is by far the most important strategy that any company should make to improve public health. It is clear that, globally, manufacturers are over reliant on the sales of unhealthy foods, which is contributing to obesity and other major public health problems.

There is increasing public demand for access to healthier food and more industry wide action. A Censuswide poll surveying people in the UK, Australia, France, Mexico, Germany and the USA found that over half of participants wanted to consume more healthy products. Over 70% wanted manufacturers to reformulate less healthy foods to make them healthier, and to produce more healthy alternatives to replace unhealthy products [8].

Stricter measures and government enforcement is needed in order to improve access to healthier food and create healthier environments for all. Simply relying on industry's willingness will yield poor results if we are unable to create a level playing field.

WASSH

References

1. Action on Salt Survey: Call for World's Largest Food Companies to Prioritise Health after new Survey Exposes Bad Practice. https://www.actiononsalt.org.uk/salt-surveys/2022/big-food-flagship-product-snapshot-survey/#d.en.971836
2. Health Star Rating System. Commonwealth of Australia. http://www.healthstarrating.gov.au/internet/healthstarrating/publishing.nsf/content/home
3. Santé publique France. Nutri-Score. https://www.santepubliquefrance.fr/en/nutri-score
4. Taillie LS, Bercholz M, Popkin B, Reyes M, Colchero MA, Corvalan C. Changes in food purchases after the Chilean policies on food labelling, marketing, and sales in schools: a before and after study. The Lancet Planetary Health 2021; 5: e526–33
5. Secretaría de Economía. MODIFICACIÓN a la Norma Oficial Mexicana NOM-051-SCFI/SSA1–2010, Especificaciones generales de etiquetado para alimentos y bebidas no alcohólicas preenvasados-Información comercial y sanitaria, publicada el 5 de abril de 2010 [Internet]. 2020 [cited 2020 Apr 2]. Available from: http://dof.gob.mx/2020/SEECO/NOM_051.pdf
6. https://www.unilever.com/files/b57e526e-4691-444f-9893-d2032f3abb0f/unileve-portfolio-assessment-against-6-nutrient-profiling-models-2022.pdf.
7. Access to Nutrition Initiative used the same definition for 'healthy' it its US Index for Health Star Rating https://accesstonutrition.org/news/atni-to-launch-new-us-index-2022-in-october/
Warning labels in the America's are used to inform the public about products that can harm health I.e. are 'healthy' https://www.paho.org/en/topics/front-package-labeling
Nutri-Score A and B have a more favourable corresponding green colour. The Network of Chambers of Trades and Crafts in France cited an increase in sales of products with a Nutri-Score of A and B, with a stable or decline in sales for C, D, E, suggesting a shift to A and B products being healthier.
8. Censuswide data published in April 2022 assessed consumer attitudes towards regulatory and market trends supporting healthier diets in the UK, USA, Germany, France Australia and Mexico. https://shareaction.org/news/investors-call-on-major-food-manufacturers-to-follow-unilevers-moves-on-health-nutrition

WASSH

About the Researchers

World Action on Salt, Sugar and Health (WASSH) is a registered charity, based at Queen Mary University of London, whose aim is to improve the health of populations throughout the world by achieving reductions in salt, sugar and calorie intake. WASSH provides resources and expert advice to enable the development and implementation of salt, sugar and calorie reduction programmes worldwide. WASSH have a global network of more than 600 expert members in 100 countries (www.worldactiononsalt.com).

ShareAction is an NGO working globally to define the highest standards for responsible investment and drive change until these standards are adopted worldwide. We mobilise investors to take action to improve labour standards, tackle climate change and address pressing global health issues.