

FEAST

Executive Summary

Food companies' commitments on population nutrition, health, and sustainability in Ireland: A detailed assessment

Company assessments and recommendations using the Business Impact Assessment on Obesity and Population Level Nutrition (BIA-Obesity) and Business Impact Assessment on Sustainability (BIA-Sustainability)

School of Public Health, University College Cork



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Authors: *Margaret M. Steele, Shannen Hussey, Stefanie Vandevijvere, Anant Jani, Janas M. Harrington*



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Executive Summary

Non-communicable diseases (NCDs) such as diabetes and cardiovascular disease are responsible for the premature death of up to 17 million people (57%) worldwide. In 2019, 90% of preventable deaths in Ireland were due to NCDs. In addition to lives lost, the economic burden continues to escalate. Spiraling costs associated with NCDs such as cardiovascular disease (CVD) and cancer cost the EU healthcare systems almost €155 billion and €103 billion respectively.

Unhealthy diet is one of the leading causes of NCDs worldwide with increased consumption of high fat, salt and sugar (HFSS) foods leading to high blood pressure, heart disease, stroke, type 2 diabetes and other harmful conditions, including overweight and obesity. A compelling case has now been made that this increased consumption is driven by changes in the food environment, rather than, for example, by changes to individuals' values and preferences, or by changes in consumption of specific nutrients.

The importance of a good diet for health and wellbeing of citizens is globally recognised. At the same time there are large health disparities, and different socioeconomic groups have differential access and ability to choose healthy foods that can help them to maintain their health. It is also recognised that increasing socioeconomic inequalities in diet and health over the past decade have coincided with large and detrimental changes in the food environment. The food environment is described as all contexts in which people engage with the food system to make their food choices. To date, to improve population diets, actions relied predominantly on individuals changing their behaviour, while the food environment in which these choices were being made remained largely unchanged or has changed to the detriment of health promoting choices. This approach not only ignores that poor diets are the result of a complex web of determinants. There is a growing consensus that structural changes are needed through the simultaneous implementation of a comprehensive set of actions and policies, including improvements of the food environment to create a shift towards healthy dietary choices in the entire population.

The food industry has the potential to be a major driver of positive change. The products and practices of the food industry play a significant role in shaping our food systems and environments, but, all too often, their impact has been negative (WHO Europe Region, 2024). Even so, food industry actors can be 'part of the solution' and it is increasingly common for companies to make extensive commitments around improved nutrition, health and sustainability.

Approach

This report presents the results of Ireland's first Business Impact assessment on Obesity and Population Nutrition (BIA-Obesity) and Business Impact Assessment on Sustainability (BIA-Sustainability).

The Business Impact Assessments (BIA) were developed by the International Network for Food and Obesity / Non-communicable Diseases Research, Monitoring and Action Support (INFORMAS) to map private sector companies' commitments and policies as they relate to the food environment. This can then be used as a benchmark against which to measure practices. These tools complement the INFORMAS Healthy Food Environment Policy Index (Food-EPI), which assesses the impact of the public sector (Vandevijvere & Swinburn, 2018). The first Irish Food-EPI Ireland was published in 2020 (Harrington et al 2020).

The BIA is a seven step process:

1. Company selection
2. Data collection
3. Liaise with companies
4. Assessment of commitments
5. Prepare prioritised recommendations for each company
6. Feed back results to each company
7. Publicly release results, including individual company and sector performance score cards

The Business Impact Assessments have been conducted in Ireland as part of the Horizon Europe project: ***Food systems that support transitions to healthy and sustainable diets (FEAST)***.

Results**BIA-Obesity**

Companies and sectors have the potential of scoring between 0% (very few/no public-facing commitments available) to 100% (comprehensive and transparent public-facing commitments relevant to Ireland available). Irish-owned or operated companies scored lower on average than international ones. This should not be taken to indicate that the Irish-based companies have few or no nutrition-related commitments. It is possible that they do have commitments, but these are not publicly available.

Packaged food and beverage manufacturing was the highest scoring sector, with a median overall BIA-obesity score of 37.47%, and a top overall score of 56.66%. In the Quick Service Restaurants sector, the median overall score was only 8.86%, and the highest overall score was 42.29%. Finally, in the supermarkets sector, the median overall score was 17.84%, while the highest overall score was 35.63%.

In the packaged food and non-alcoholic beverage manufacturers sector the strongest overall score was achieved by Danone (56.66%) who scored highest in all domains except product reformulation and nutrition labelling. Coca-Cola Hellenic Bottling Co (55.58% overall score) scored highest in the reformulation domain and came in close second overall. Boyne Valley Foods is the lowest scoring company, scoring zero in all domains except nutrition labelling and Relationships with other organisations.

The highest median and the highest individual company score is found in the domain of corporate nutrition strategy, followed by the formulation domain. The weakest domains across the sector are product accessibility and relationships with other organizations.

In the quick service restaurant sector, McDonald's had the highest overall score (42.29%), driven by relatively high scores in the formulation, accessibility and relationships domains. However, Domino's scored higher than McDonald's in the promotion domain, and both Domino's and Yum! Brands scored higher in the nutrition strategy domain. Abrakebabra scored zero in all domains except relationships, where they scored points for transparency due to public statements about their charity donations. Eddie Rocket's City Diner scored zero in all domains, with no publicly available commitments found in any domain. The quick service restaurant sector was the lowest scoring of the three sectors, with medians falling below 20% in all domains. This is driven, in part, by the fact that four out of the eight assessed companies had no publicly available commitments in most or all domains.

In the supermarket sector, the strongest overall score was achieved by Tesco (35.63%), although Aldi is a close second (28.13%), and had the highest scores in reformulation, labelling and relationships domains. The highest scoring domain in this sector was corporate nutrition strategy (63.33%) followed by formulation (26.67%) and relationships with other organisations (22%). The promotion and accessibility domains were especially weak. Half of the supermarkets assessed had no commitments at all in the accessibility domain. As well as scoring highest overall, Tesco has significantly more publicly available commitments around marketing and promotion than any other supermarket, for example, it has an explicit policy not to use marketing channels with an audience that is more than 25% children. It is also the only supermarket in Ireland that has made all its checkouts sweet-free. Dunnes Stores is the lowest scoring supermarket, scoring zero in all domains except relationships, where it scored points for transparency due to public statements about its charity donations.

Examples of best available commitments in nutrition and health

- **Strategy:** KFC UK and Ireland (part of Yum! Brands) aligns its nutrition policy with UK government public health targets.
- **Product formulation:** Coca-Cola Hellenic Bottling Co publishes SMART commitments on sugar reduction on its Irish website. Lidl Ireland aligns its reformulation commitments with the Irish government's Reformulation Roadmap.
- **Nutrition labelling:** Mars Inc published a commitment on its Irish website not to make health or nutrition claims on unhealthy products. Supervalu (Musgrave Group) has rolled out a colour-coded front-of-pack label system on some of its private label ranges.
- **Product and brand promotion:** The Coca-Cola Co. commits not to undertake branded sponsorships of sporting and entertainment events which primarily target children under 13.
- **Accessibility:** Tesco plc commits to 65% healthy food sales in the Republic of Ireland by 2025.
- **Relationships with other organisations:** Danone publicly discloses a commitment not to make any corporate political donations.

BIA-Sustainability

Irish-owned or operated companies scored lower on average than international ones. As with BIA-Obesity, this should not be taken to indicate that the Irish-based companies have few or no sustainability commitments. It is possible that they do have commitments, but these are not publicly available. Seven of the ten lowest scoring companies are Irish brands. Kerry Group is the highest scoring Irish company, with an overall score of 38.17% (out of a possible 100%).

Packaged food and non-alcoholic beverage manufacturers is, again, the strongest performing sector, with nine of the top ten scoring companies in this sector. The highest scoring company is Danone, with an overall score of just under 53%. The lowest score was Boyne Valley Foods, with an overall score of just 4%. The highest scores in the manufacturing sector are found in the strategy, packaging, and emissions domains. Every company assessed had at least some commitment in each of these domains, as well as in the energy domain.

In the quick service restaurant sector, the strongest overall score was achieved by Yum! Brands (39.76%). Abrakebabra Ltd. was the lowest scoring company in this sector, scoring zero in all domains. There was a notable difference between national-owned or operated companies versus multinationals. The highest scoring companies were Yum! Brands, owner of KFC (39.76% overall BIA-sustainability score), McDonald's Corp (34.39%), Domino's Pizza (26.84%) and Restaurant Brands International, which owns Burger King (24.85%). The highest scoring Irish-based company was Insomnia Coffee Company, with 5.96% overall. Supermac's scored 2.39% overall, while Eddie Rocket's scored 1.39%.

In the supermarket sector, the strongest overall score was achieved by Tesco (overall score 45.13%) who scored highest in all domains except environmental compliance and sustainable products. Dunnes Stores was the lowest scoring supermarket, scoring zero in all domains.

Examples of best available commitments on sustainability

- **Strategy:** Musgrave Group participates in the United Nations Global Compact and supports the Sustainable Development Goals on its website.
- **Packaging:** PepsiCo has SMART targets to reducing packaging and to increase the proportion of recycled and renewable materials used in its packaging.
- **Emissions:** Suntory publishes emissions data, including breakdown by gas type, and has SMART targets for emissions reduction that have been approved by the Science-Based Targets initiative (SBTi).
- **Energy:** The Coca-Cola Co. commits to replace all older coolers with more energy-efficient models to reduce energy use, including in Ireland.
- **Water and discharge:** Coca-Cola Hellenic Bottling Co. measures, and publishes SMART targets to reduce, its water withdrawal from areas of water stress.
- **Biodiversity:** Unilever commits to protecting and regenerating 1.5 million hectares of land, forests and oceans by 2030. Among Irish companies, Supermac's *Glan agus Glas* initiative includes measures to tackle litter.
- **Food waste:** Unilever commits to halve food waste in its direct operations by 2025.
- **Animal-based products:** McDonalds Ireland commits to having a market leading vegan plant-based food and drinks offering by 2025.
- **Sustainable products:** Lidl Ireland commits to continue expanding its offering of organic food products.

An important observation

In both assessments, there is a marked difference in scores between Irish companies and multinationals, with the latter generally publishing more commitments and therefore scoring higher. This is most clearly visible in the quick service restaurants domain, where the top four scores are achieved by large, global fast food chains, whereas the bottom four scores are all Irish-centred companies.

In interpreting these results it is crucial to keep in mind that the BIAs in and of themselves assess commitments, not practices. They provide a map of publicly available company policies and aims against which company practice can be measured, but do not, on their own, give a full accounting of a company's impact in all aspects. For many smaller companies, such as the Irish-owned quick service restaurant chains we assessed here, it might not be feasible to develop and publish comprehensive policies in every domain of both BIAs. But their size and identity can also be a strength, giving them the agility and community trust to make changes with real impact in Ireland.

However, **this also requires government to implement clear and consistent regulations to ensure that smaller companies – and smaller producers, including farmers – are on a level playing field.** The current food system works to the advantage of large, multinational corporations but this does not mean that it is beneficial to all food businesses. On the contrary, many small retailers, producers and farmers – including, in some cases, key suppliers to the bigger companies – are struggling to survive. A packet of Government measures to support, in particular smaller companies, to publish commitments and to implement these commitments would be welcomed. In this respect, the analysis of the BIA-Obesity and BIA-Sustainability has informed a number of priority recommendations.

Priority Recommendations for all sectors and companies

Transparency/disclosure

Companies should increase transparency around their policy positions. Only a minority of companies publicly state their stance on regulation of advertising, taxation of unhealthy foods, and similar measures. Of those that do publicly disclose their position, many do so via membership of an industry alliance such as Unesda.

All companies should increase transparency in the domain of environmental compliance. We did not find public statements relating to this domain for any of the companies assessed.

Irish companies, in particular, should publicly disclose their commitments and practices in relation to nutrition, health and sustainability. A number of Irish companies assessed have very low scores in one or both assessments, but this does not necessarily mean their impact on the food environment is worse than that of their global counterparts. Indeed, it is quite possible that their impact is less negative, but this is impossible to assess unless they increase transparency.

Relevance to the national context

Global companies must develop and/or disclose policies tailored to particular national contexts, including Ireland. This is particularly important in the sustainability domains, since each region has its own environmental challenges. For example, Ireland is not an area of water stress, but the Environmental Protection Agency has raised significant concerns about water quality in Ireland (Environmental Protection Agency, 2024). Therefore companies who source their ingredients from within Ireland might focus their water efforts on the quality and quantity of water discharge across their supply chain, whereas those who source key ingredients globally have to consider whether ingredients are coming from water stressed areas.

In particular, companies must explain how their reformulation commitments relate to Ireland's reformulation Roadmap, as well as disclosing their policy stances on the other key actions of the Obesity Policy and Action Plan.

Companies must also explain how their policies align with Food Vision 2030 and the government's overall sustainability strategy. On the other hand, government must implement stronger policy to ensure all companies are on a level playing field. For example, there is a need for mandatory regulation of marketing of foods to children, especially in the digital environment, where children are particularly vulnerable to tactics such as the use of influencers. Similarly, government could introduce legislation requiring all retailers to remove unhealthy foods from prominent locations such as near checkouts, so that no one company has to take the risk of being the first to do this.

Comprehensiveness and specificity

While most companies disclose at least some commitments around sustainability and nutrition, these are sometimes couched in vague or aspirational language. For example, 16 companies express some degree of commitment to providing plant-based products, but **companies must also disclose SMART targets or commit to increasing the proportion of plant-based products in their portfolio.**

Companies can avoid accusations of 'greenwashing' (De Freitas Netto et al., 2020), 'leanwashing' (Karnani et al., 2014), and similar tactics by developing and/or disclosing specific, measurable and timebound targets in all domains.

For example, very few companies measure or disclose the environmental impact of their key suppliers. All companies but **especially multinational companies with large global supply chains must disclose comprehensive information on the policies and practices of their key suppliers, and must develop or disclose SMART targets to limit negative impact.**

Similarly, while many companies express general aspirations to ensure informed or educated consumers, **companies must develop and/or disclose SMART targets to implement evidence-based front-of-pack labelling on all food products in Ireland.** Government can support this by establishing a mandatory front-of-pack labelling system.

Companies must develop or disclose SMART targets for eliminating all forms of marketing of unhealthy brands and products to children. For example, some companies commit not to advertise unhealthy products in broadcast programs aimed primarily at children, but children's media consumption is by no means confined to such broadcasts. Others make commitments that apply only to children under the age of 13, rather than to all children and adolescents.

Companies must commit to make healthy food more affordable. Quick service restaurants could commit not to offer meal deals that exceed recommended amounts of fat, salt, sugar and energy, and manufacturers and supermarkets could commit to use price promotions to make healthy food more affordable relative to unhealthy food.

The current health status of people living in Ireland, lifestyle factors and inequalities in health outcomes must be urgently addressed through food environment reform. Ireland has an excellent opportunity to improve the diets of the Irish population, prevent obesity and diet-related NCD's and to reduce the impact the food sector has on the environment by investing in highly cost-effective policies and programmes which have demonstrated success in a number of countries. The food industry has a key role to play in improving the food environment for both population and planetary health. While companies themselves have a pivotal role to play in improving the healthiness and sustainability of the food environment, it is crucial that government, too, plays its role. **The development of the next iteration of the Obesity Policy and Action Plan is the perfect opportunity for government to ensure it is playing its part in making healthier and more sustainable diets accessible and affordable for everyone in Ireland.**

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