

The Role of the Food and Beverage Industry in Ensuring a Healthy Food Supply

Introduction

Ending hunger and ensuring food security has been a focus of the international community for decades, dating back at least to the creation of the World Food Programme in 1961.¹ Recently, food security has been included in the 2015 United Nations Sustainable Development Agenda draft, reaffirming its importance in the global community today. Efforts to ensure worldwide food security often focus on agricultural output, with the main priority being to supply a sufficient *quantity* of food to all people at all times. However, the definition of food security also includes parameters about the *quality* of food; that is, food security is defined as all people at all times having access to enough “nutritious food for a healthy lifestyle.”² With both the quantity and the quality aspects of food security in mind, this report will focus on the role of the world’s largest food and beverage companies in ensuring a sufficient, safe, and nutritious food supply.

Globalization and increased trade has opened new markets for the food and beverage industry. Processed foods represent 80% of global food sales, with sales in developing countries growing at the fastest rate.³ The availability of cheap and convenient foods in developing countries has resulted in the “nutrition transition,” a term that has been coined in recent years to reflect the changing disease burden that has been associated with dietary and lifestyle changes.⁴ Increased rates of obesity and non-communicable diseases (NCDs) have come with the increased consumption of processed foods and decreased rates of physical activity. These processed foods have allowed many people worldwide to have access to a sufficient quantity of food, but the nutritional quality of the food is not always adequate for a healthy lifestyle. Obesity and under nutrition are both symptoms of a food system that does not ensure food security; by focusing too much on increasing the quantity of food available in order to decrease the rates of under nutrition, and not focusing enough on the quality of available food, obesity is increasingly becoming an issue worldwide.⁵

Due to middle class income growth and urbanization worldwide, there is a large market for processed foods. Demand for such foods and beverages will continue to grow,⁶ and therefore

the food and beverage industry cannot reasonably be expected to stop making and selling processed foods altogether. However, many food and beverage companies have recognized that the increasing rate of obesity is a concern, and have taken steps to provide and create a demand for a more healthful food supply. The major areas of reform that the food and beverage industry has focused on are product reformulation, marketing to children under 12, and responsible product labeling. These companies also participate in physical activity promotion and other initiatives to promote healthy lifestyles.

Food and Beverage Industry Coalitions

The International Food and Beverage Alliance (IFBA) was created in 2008 in response to the 2004 WHO Global Strategy on Diet, Physical Activity, and Health. Members of the IFBA include Coca-Cola, Ferrero, General Mills, Grupo Bimbo, Kellogg Company, Mars, McDonald's, Mondelez International, Nestlé, PepsiCo and Unilever. Together, they have committed to five concrete actions to create a healthier food supply: reformulate products and develop new products that support the goals of improving diets, provide clear and fact-based nutrition information to all consumers, extend responsible advertising initiatives and marketing to children globally, raise awareness on balanced diets and increased levels of physical activity, and actively support public-private partnerships to further the goals of the WHO's 2004 Global Strategy.⁶

Regional industry coalitions have formed to self-regulate marketing to children under 12. In the United States (US) and Canada, these coalitions include the Children's Food and Beverage Advertising Initiative (CFBAI) and the Children's Advertising Review Unit (CARU) of the Council of Better Business Bureaus (CBBB). Membership in the CFBAI consists of food and beverage companies, and in 2012, the 16 company members of the CFBAI were responsible for 90% of all food marketing to children.⁸ Since then, their membership has grown to include 18 companies: Burger King, Campbell Soup, Coca-Cola, ConAgra Foods, Danone, Ferrero, General Mills, Hershey's, Hillshire, Kellogg Company, Kraft, Mars, McDonald's, Mondelez International, Nestlé, PepsiCo, Post Foods, and Unilever. CFBAI commitments are focused on increasing the nutritional quality of foods and beverages that are advertised to children. CARU is made up of advertisement and marketing firms, and regulates the way in which foods and beverages are advertised to children, taking into account children's vulnerabilities.⁹

Another industry-led coalition based in the United States is the Healthy Weight Commitment Foundation (HWCF), which is made up of over 250 US-based food and beverage companies. These companies have committed to reducing the total calories available in the US food supply and to supporting physical activity programs.¹⁰ Additionally, a private sector coalition with member companies from multiple industries called A Partnership for a Healthy America was born out of Michelle Obama's Let's Move! initiative. This coalition is focused on bringing healthy foods to kids in the United States, and there are some food and beverage manufacturers involved, such as Birds Eye, Darden, and Fresh Mushrooms.¹¹

In Europe, food and beverage companies have joined the European Union (EU) Pledge, a voluntary commitment to change the way food is advertised to children. The EU Pledge was created in 2007 as a response to the 2005 EU Platform for Action on Diet, Physical Activity and Health.¹² Since then, it has enhanced its nutritional guidelines on the types of foods that can be advertised to children, and it has grown to include 21 members: Burger King, Coca-Cola, Danone, Amica Chips, ICA Foods, Intersnack, KiMs, Lorenz Snack-World, Unichips – San Carlo, Zweifel Pomy-Chips, Ferrero, General Mills, Kellogg's, Mars, McDonalds Europe, Mondelez, Nestlé, PepsiCo, Quick Group, Royal FrieslandCampina, and Unilever. Together, these member companies account for 80% of food and beverage advertisement expenditures in the EU.¹³ Additionally, there are national pledges in Switzerland, Portugal, and Belgium whose members are made up of both national and international food and beverage companies.

In Australia, there is a national coalition of packaged food, drink, and grocery manufacturers called the Australian Food and Grocery Council (AFGC). The AFGC is comprised of 150 member companies, representing over 80% of the gross dollar value of the food and grocery sector.¹⁴ As an organization, they have many general policies when it comes to food labeling, marketing to children, and nutrition standards. Additionally, the AFGC created the Responsible Children's Marketing Initiative (RCMI) in 2008. All AFGC members are encouraged to join the RCMI, and the core principles of the RCMI were updated in 2014. Currently there are 17 signatories of the RCMI: Campbell Arnott's, Cereal Partners Worldwide, Coca-Cola, Fonterra Brands, Ferrero, General Mills, George Weston Foods, Kellogg's, Lion Dairy and Drinks, Mars, Mondelez, Nestlé, Patties Foods, PepsiCo, Sanitarium Health Food Company, Simplot, and Unilever.

In the United Kingdom (UK), the British Retail Consortium (BRC) created a British retailing Commitment to Health in 2008 in response to the UK Department of Health's Healthy Food Code of Good Practice.¹⁵ The BRC uses the framework set out by the UK Department of Health to guide its actions when it comes to providing nutritious foods. While the BRC represents about 80% of food retailers in the UK,¹⁶ the Commitment to Health does not require concrete commitments from its members. It merely highlights that the guidelines set out by the government should be followed by the food and beverage industry in Britain.

It is interesting to note that most of these industry coalitions to self-regulate have come about as a response to policy initiatives. The IFBA was created in response to a WHO action statement, the EU Pledge came after the EU Platform for Action, and the BRC created the Commitment to Health in response to the UK's Healthy Food Code. The CFBAI was created in 2006 with goals based on an Institute of Medicine (IOM) report; this report had been commissioned by the US congress in 2004 to evaluate the impact of marketing on childhood obesity.^{17, 18} It found that there was sufficient evidence that marketing affected the food and beverage preferences of children aged 2-11.¹⁹ Thus, the CFBAI was voluntarily created by the food and beverage industry in response to a report that had been commissioned by concerned policymakers. In this case, the threat of governmental regulation was enough to spur the private sector into voluntarily reforming their policies on advertising.

Product Reformulation

The food and beverage industry has voluntarily reformulated their products in response to public health recommendations and consumer demand. For example, the amount of trans-fats in the food supply has drastically decreased in the past ten years in the US as a result of consumer awareness, and package labeling regulations from the Food and Drug Administration (FDA).²⁰ More recently, IFBA companies have voluntarily committed to decreasing the amount of sodium, saturated fats, trans fats, sugars, and calories in products across their diverse portfolios. This has resulted in a wide range of improvements, from a 59% reduction in sodium in General Mill's cereal since 1997 to Coca-Cola's launch of one hundred new low-calorie or no-calorie products in 2012.²¹ The HWCF made a goal to eliminate 1.5 trillion calories from the US food supply by 2015, which they reached two years early in 2013.¹⁰ In the UK, supermarket members of the BRC have removed all hydrogenated vegetable oils and fats from their own brand products.²²

There is no doubt that these changes have resulted in positive contributions to the food supply; the FDA estimates that eliminating trans-fats from the food supply would result in 20,000 fewer heart attacks per year.²⁰ Companies should continue to reformulate products so that fewer ingredients that are correlated with diet-related diseases are available on the market.

Product reformulation can result in health benefits for the population, but there are some concerns that both consumers and companies need to consider. Critics have pointed out that reformulation can result in an increase in some harmful ingredients while decreasing other harmful ingredients. The classic example is low- or no-fat foods containing more salt and sugar than their original counterparts.²³ Trading a decrease in fat for an increase in salt or sugar does not make the new product healthier than the original. Additionally, foods and beverages that are reformulated to have less salt, fat, and sugar might be better than the original consumables, but are still not necessarily “healthy.”

Foods with beneficial ingredients added also pose some challenges. The conundrum is that the foods that have been shown to yield health benefits are largely unprocessed, such as whole grains, fiber, nuts, fruits and vegetables. Processed products that contain these beneficial ingredients might still contain high amounts of fat, salt and sugar. Critics have argued that this can be misleading to consumers. However, if an individual’s diet is made up solely of processed foods and beverages due to food access issues, adding healthy ingredients to these processed foods at least increases access to some beneficial ingredients. This is why it is imperative that processed foods are reformulated to both increase beneficial ingredients and decrease harmful ingredients.

When it comes to the fortification of processed goods with vitamins and minerals, identifying the role of the food and beverage industry is complex. Fortifying staple foods with vitamins and minerals has been shown to be a hugely successful and cost-effective way to decrease nutrient deficiencies in the population.^{24, 25} For example, the fortification of wheat with folic acid in Chile and the United States has decreased the prevalence of neural tube defects and spina bifida.²⁵ However, for fortification to be successful in improving population health, the nutrient needs and dietary habits of the target population must be well understood. The addition of vitamins and minerals to the food supply only yields large-scale benefits when the general population is at risk for deficiency. This is why the fortification of consumables with vitamins and minerals as a public health measure is generally left up to governmental regulation or

oversight agencies; individual governments can assess the nutrient deficiency risk in their population and take steps to combat this generalized risk with staple food fortification.

In this capacity, fortification has been greatly effective as a way to combat nutrient deficiencies, as in the case of wheat fortification and iodized salt in industrialized settings. However, in developing countries, nutrition and health are not always top political priorities, even when there is a demonstrated population need for vitamin and mineral fortification.²⁶ In this case, the private sector can play a role in developing and distributing foods that address certain nutrient deficiencies. Whether implemented through governmental regulation or through the food and beverage industry, successful food fortification initiatives are focused on addressing specific deficiencies. Widespread, indiscriminate fortification will likely not lead to increased health benefits for the population, and could increase the risk of toxicity if consumers are not aware of the negative effects of consuming too much of these nutrients.

Product reformulation is generally done at the individual-company level, rather than being based on coalition commitments. There are a few exceptions: the IFBA and the AFGC have specific reformulation commitments, and companies that are part of the Food and Drink Federation based in the UK have set specific targets for calorie, salt, saturated fat and trans fat reduction.³⁴ There are many coalitions that have formed to ensure that products marketed to children under 12 are healthy, and government regulations on labeling have spurred companies to reformulate products. This interplay between responsible advertising, labeling, and reformulation has encouraged individual companies to invest in making their products healthier, as being able to advertise and label their food as healthy gives them a competitive edge in the market.

Marketing to Children Under 12

Many coalitions have been formed to encourage responsible marketing to children less than twelve years of age. Companies in the IFBA and those who sign on to the EU pledge commit to advertising only better-for-you products in media directed towards children under twelve, or to not advertise at all to this age group. Additionally, these companies commit to eliminate all advertising in elementary schools.⁷ The CFBAI and RCMI have similar commitments, but these coalitions even go further and include restrictions on product placement, the use of products in interactive games, and the use of popular children's characters in

advertisements. Both the CFBAI and RCMC operate by having companies make individual commitments based on these criteria.^{14, 27} The CFBAI is the only coalition that bans advertisements directed at children through mobile media and word-of-mouth; all other coalitions focus mainly on television advertisements and advertisements on company websites.

Most of these coalitions define advertising directed at children under twelve as advertisements during measured media (television, radio, print, and internet) where at least 35% of the audience is under twelve. Health standards for advertisements are generally set by each individual company, and are based on governmental or scientific standards.^{14, 21, 27} The CFBAI recently came out with more stringent standards on what can be advertised to children based on the 2010 Dietary Guidelines for Americans, and the EU Pledge implemented more stringent nutrition requirements in 2012.^{12, 17} These new standards include calorie limits as well as foods to encourage; for example, fruits and vegetables need to be present in all advertised meals.

All of these coalitions have methods for monitoring compliance with pledges, and evaluation is done both internally and externally. The IFBA marketing commitments are monitored by an independent third party that evaluates compliance for all IFBA members in randomly selected markets around the world. In 2013, compliance was 96.9% for television and 100% for all other measured media.²⁸ The CFBAI monitors each individual company's compliance and notifies companies when their practices are not in compliance with their pledges. In 2012, none of the CFBAI companies substantially violated their pledges, and the violations that did occur were promptly corrected.¹⁷ The EU Pledge commitments are monitored by a third party, and compliance in 2013 was 98.1% for television advertisements and 94% for company websites.¹³ Compliance with RCMC Company Action Plans are monitored by a third party, and in 2012 almost half of signatory companies were fully compliant, with the other companies occasionally airing non-compliant advertisements.¹⁴ These non-compliant advertisements were isolated enough to be interpreted as unintentional slip-ups on the part of the company. The BRC does not have formal commitments, but it has reported that most of its member companies do not advertise to children, and if they do, the advertisements are for healthy products.¹⁶

While compliance with commitments is high across coalitions, there are a few concerns that need to be raised. One concern is that compliance reports are subject to some bias; while most pledges are monitored by outside parties, compliance and progress reports are published by the industry coalition itself (with the exception of the IFBA progress report, which is published

by Accenture). Another concern is that, while companies appear to be doing a good job of not advertising to children under twelve, they are still advertising just as much to adults and children who are older than twelve. Focusing on one age group may give companies the appearance that they are marketing responsibly, when in reality they are advertising low nutritious foods as much as ever to people who are older than twelve years old. Since food security is defined for “all people at all times,” companies should extend their responsible marketing practices to people who are older than twelve as well.

Perhaps the largest concern in terms of the breadth of these commitments is that there is a large amount of overlap between the companies who are members of these various coalitions. There are some regional differences when it comes to the food and beverage companies involved in regional pledges, but there are nine companies that seem to be making up the core group of all these commitments. Coca-Cola, Ferrero, General Mill’s, Kellogg’s, Mars, Mondelez, Nestlé, PepsiCo, and Unilever are all members of the IFBA, CFBAI, EU Pledge and RCMI. Having three active private sector coalitions from different regions of the world (CFBAI, EU Pledge, and RCMI) seems like an excellent situation, but when around half of all the companies involved in regional commitments are the same nine companies that are already involved in a global commitment, private sector involvement starts to seem less impressive.

There are some glaring gaps when it comes to the companies who are involved, and the regions of the world in which efforts are focused. Companies that are based in Asia are conspicuously absent from regional and international commitments. Two of the top ten grossing food and beverage firms globally are from Asia: Wilmar based Singapore and Anjinomoto based in Japan.²⁹ These two companies sell their products around the world, so it is important that they be involved in coalitions as well. Additionally, there are no regional coalitions that have commitments regarding marketing to children in Asia, Africa, or Latin America; all of the regional coalitions currently in existence are focused on Europe, Australia and North America.

Responsible Product Labeling

Another component of supporting a healthy food supply is providing consumers with accurate nutritional information about the products that they purchase and consume. The main method of conveying information about processed foods to consumers is through on-package labeling, which has been the subject of both voluntary and non-voluntary regulation. Countries

have their own labeling standards that companies are required to follow, and the IFBA has also recognized that simple and easy-to-read labeling on products is an essential component for consumers to be able to make healthy choices. However, unlike with reformulation goals and marketing standards, the IFBA does not have a universal responsible labeling commitment, and the CFBAI and EU Pledge commitments do not cover packaging at all.⁸ Package labeling is only weakly covered in AFGC and BRC public statements, and no commitments are required from individual companies. This makes for confusing labeling for consumers; one company's products might include calorie labels on the front, another might have a stoplight with different colors to indicate the healthfulness, and still another might report the percent daily value of salt and fat.³⁰ With all of these different parameters, it is hard for consumers to gauge which foods will support a healthy lifestyle. This confusing atmosphere is one of the main criticisms of food labeling, and some countries have come up with universal standards and symbols to help decrease this confusion (such as the traffic light symbol in the United Kingdom).³⁰ However, there is no worldwide standard for labeling foods, and in many countries packaged food labels continue to create a confusing atmosphere.

The food and beverage industry is responsible for providing accurate nutritional information in a way that is not misleading to consumers. There are many instances in which critics have asserted that food and beverage companies have misled consumers on package labels. Words such as “natural” and “healthy” do not have a universal definition, and the food and beverage industry has used such words to attract consumers to their products. In addition to vague and misleading wording on the front of packaging, food and beverage companies have often labeled their products with misleading ingredient claims. For example, a bread product might be labeled as “whole grain,” when in reality the product only contains a small percentage of whole-wheat flour. Phrases such as “contains real fruit” can also be misleading, as the product might only contain fruit juice from concentrate, lack healthy fruit fiber, and contain added sugars.³⁰ As consumers become more health conscious, package labels become ever more important in food purchasing decisions, and the food and beverage industry should not use this to manipulate consumers into buying products that are not as healthy as they seem.

Other Efforts

The food and beverage industry has made other efforts to ensure that all people have access to a healthy lifestyle. All companies within the IFBA are involved in projects around the world to encourage physical activity and promote healthy lifestyles. For example, Ferrero and Mars have teamed up with Together Let's Prevent Childhood Obesity (EPODE) on a project to decrease health inequalities in diet and physical activity.²¹ The HWCF has funded projects across the United States to increase physical activity in schools and increase access to nutritional education. These projects reached 12.5 million children in 2013.¹⁰

In addition to promoting physical activity, the food and beverage industry has started investing in healthy lifestyle advertising. Members of the BRC have officially signed up with the UK government's Change4Life initiative, promoting the campaign in stores and making sure that the slogan "Eat Well, Move More, Live Longer" is salient to the public.¹⁶ There are companies involved in the Partnership for a Healthy America who have committed to investing in more adds for frozen fruits and vegetables, and companies who are part of the BRC have actively promoted cooking to kids.^{11, 16}

Continuing the Commitment

Through reformulation, partnerships with other organizations, the promotion of healthy lifestyles, and responsible marketing and labeling policies, companies in the food and beverage industry have shown a commitment to ensuring that all people have access to a healthy lifestyle. However, the industry can still do more to ensure a sufficient and nutritious food supply. When it comes to reformulation, companies should continue to invest in research and development to supply the world with healthy food. Reformulation efforts have thus far focused primarily on making processed food less unhealthy, but the industry has a role to play in providing people with foods that have been shown to have health benefits; that is, unprocessed fruits and vegetables, whole grains, and fiber. The next step in product development is to discover new ways to maintain the integrity of "real food" when it has to be transported worldwide.

One of the greatest strengths of the food and beverage industry is its expertise in effective marketing. Many of the companies that have pledged to stop advertising unhealthy foods to children under 12 have also started showing ads that promote healthy lifestyles. The food and beverage industry should continue this trend, creating salient public health messages that encourage healthy lifestyles. In 2006, the industry spent almost 1,200 times the amount of money

on advertising than the US government spent on promoting a healthy diet; this shows that industry resources are immense compared to government resources, and collaboration to leverage these resources has the potential to be hugely beneficial to public health.³¹

Perhaps the most important area for continued improvement is in the breadth of commitments to improve the food supply. There continues to be much work to be done in getting more companies involved and in ensuring that all regions of the world are benefiting from improvements. The IFBA is a global coalition that has multiple pertinent commitments, but its membership is relatively small. In 2011, the food manufacturers that were part of the IFBA represented only 15.2% of the global food sales market.³² While membership has grown slightly since that time, the reach of the IFBA is certainly not all-inclusive. Many large corporations continue to not participate in efforts to improve the food supply, most notably the multinationals that are based in Asia. Additionally, there are entire continents where no regional commitments exist; all existing coalitions are based in North America, Europe, and Australia. It is possible that there is a trickle-down effect of reformulation, where multinationals reformulate products due to commitments in North America, Europe, and Australia, and then sell their healthier products in South American, Asian, and African markets. However, overall, commitments to improving the food supply in the latter regions are lacking.

While working to increase participation on a global level is important, small and medium sized companies (SME's) also have a role to play in providing a healthy food supply. Investment in the development of healthy foods can be costly, and SME's may not be able to reformulate their products due to financial constraints. There are two ways in which large food and beverage companies can aid SME's in order to improve the food supply. The first is through knowledge sharing and capacity building. The second is through supporting governmental regulation. Increased regulation would hold all companies to the same standard, leveling the playing field and making it possible for SME's to invest in research and development while remaining competitive. Regulations such as improved nutritional standards, package labeling requirements, and restrictions on marketing to children would all help improve the food supply. These are actions that large companies are already voluntarily undertaking, and by supporting governmental regulation, these positive practices can be spread industry-wide.

Finally, it would be beneficial for more private sector coalitions to form around commitments to providing a healthy food supply. The majority of coalitions to date have formed

around commitments to marketing to children under 12, with a few exceptions such as the IFBA, AFGC and FDF. While commitments to marketing healthy foods create an incentive for companies to improve the nutritional quality of their products, it would be beneficial to have concrete commitments from companies to provide foods that meet certain nutritional standards. These commitments could be monitored like advertising commitments are monitored, and would result in healthier foods available on the market.

Conclusions

Many companies in the food and beverage industry have thus far made positive and voluntary changes to the way in which they process and market foods. In addition, these companies have engaged in partnerships worldwide to ensure a stable and healthy food supply, and have supported countless efforts to increase physical activity and promote healthy lifestyles. These initiatives are not only morally sound, but financially beneficial as well. In a report from the Hudson Institute, it was found that sales of lower-calorie products were driving growth for HWCF companies, and the report recommended that companies continue their efforts to create better-for-you products.³³

By continuing to reformulate products, engaging with public health experts to promote healthy lifestyles through advertisements, and getting more companies across the world involved in the movement, companies in the food and beverage industry can ensure a nutritious food supply. The industry should support governmental regulation when it comes to nutritional standards, marketing restrictions, and product labels so that the beneficial practices that large companies are currently undertaking become the norm across the industry.

There is no doubt that the food and beverage industry will continue to be instrumental in providing healthy food into the future. Voluntary commitments from the industry to improve nutritional quality, decrease marketing, and provide accurate nutritional information have been the norm thus far, but more governmental regulations are needed to guide these efforts and ensure that all companies are involved sector-wide. By leveraging the private industry's resources and expertise, the world will continue to make progress towards ensuring food security for all people.

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