Deloitte.

The Consumer Goods FORUM



Health & Wellness Progress Report

Based on 2018 survey findings

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What our members are doing to support healthier lives

The survey results show good progress in all categories and significant improvement in achievement of all commitments, in particular since last year.

Almost 2M employees participated in health and wellness initiatives
1.6M in 2017 and 1.3M in 2016



PRODUCT FORMULATION

98% of companies reported reformulating at least some part of their product portfolio to align with health and wellness policies. Since 2015 over 320,000 products have been reformulated.



Over **70%** of companies reported reformulating salt and sugar in their products



TRANSPARENCY & LABELLING

79% of companies reported that their **food and beverage products** display key nutrients information on product packaging (similar to 2017)

84% of companies reported that their **personal care and hygiene products** display clear product usages on packaging (+18% compared to 2017)

76% of companies reported that they are not advertising HFSS products to children under 12

61% participated in food bank programmes (nearly 93,000 tonnes of food donated)

Replace with the following: Partnerships with education authorities on health and wellness initiatives for over

550,000 schools

PARTICIPATION

75
respondents

More employees are represented than last year

Steady representation across categories
Food and beverage manufacturers are the most represented

Board member companies continue to perform better, in particular in achievement of commitments on product formulation and marketing to children

Message from our Board sponsors

More and more consumers are making healthier lifestyle choices. The people and communities our industry serves around the world are increasingly determined to make their ways of consuming healthier and more responsible. They are doing so because it is good for them and good for the planet.

That is why the positive change agenda The Consumer Goods Forum initiated in 2010 is more relevant than ever, in particular our resolutions and commitments on Health & Wellness and Sustainability.

This is the fifth edition of the CGF Health & Wellness report, which measures progress on our resolutions and commitments. The five years' worth of results show that we are meeting consumers' expectations and fulfilling our ambition to 'empower consumers to lead healthier lives'.

Key highlights include:

- Over 98% of responding companies said that they had reformulated at least some part of their product portfolio in accordance with their own health and wellness policies.
- Over 70% of companies offered low-salt or low-sugar versions of their products.
- 79% of companies declared that 81%-100% of their food and beverage products display key nutrient information on pack.
- 84% declared that 81%-100% of their personal care and hygiene portfolio clearly display proper product use
- Respondents partnered with education authorities on health and wellness initiatives for over 550,000 schools.
- At least two million employees participated in health and wellness programmes.

The CGF Health & Wellness Pillar supports the WHO Action Plan on non-communicable diseases, as well as three of the UN Sustainable Development Goals (SDGs): zero hunger (Goal 2), good health and well-being (Goal 3), and partnerships for the goals (Goal 17).

This report shows our efforts to work towards these goals in a business context, foster collaborative action, and provide practical tools to help with their implementation and growth. It also serves as a guide to CGF members as they embark on their own internal health and wellness initiatives.

Our member companies should be proud of their commitment to improving the health and wellness of their consumers, their communities and their employees. Of course, the road is a long one and many challenges lie ahead. As we look for new and innovative ways to grow our businesses, health and wellness considerations should play a role in our decisions. Health and wellness can be an important source of added value for our companies and for society.

Please take a moment to have a closer look at the results of the survey to understand our progress and get inspiration for further action.



Mark Schneider
CEO Nestlé S.A.
Board Co-Sponsor of The Consumer Goods Forum
Health & Wellness Pillar



Frans Muller
President and CEO Ahold Delhaize
Board Co-Sponsor of The Consumer Goods Forum
Health & Wellness Pillar

Executive Summary

A lot can happen in five years. Over this period, the CGF has tracked a number of trends and tendencies related to health and wellness and several changes stand out. We have noted, for example, that consumers increasingly favour products made in accordance with principles of sustainability. Increasingly, consumers also want more transparency.

When considered along with our annual survey, this report gives our members a better understanding of the issues that matter most to their customers. Just as importantly, the CGF Health & Wellness Progress Report shows how well our industry is addressing these concerns.

At the beginning of this five-year journey, we set goals in the form of commitments and resolutions. These were designed to reveal particular ways of addressing health and wellness concerns, from participating in community food banks to changing product formulations. We are happy to note that over the past five years we have seen steady advances on the resolutions and commitments, the details of which are outlined in this report. If we focus specifically on the past year, there has been a significant improvement in the achievement of all commitments.

Survey participation has fluctuated somewhat over the five-year report period, but remains indicative of the whole industry. All geographies and product categories are once again well represented. Perhaps the most encouraging result is that in 2018, participation in terms of number of employees represented exceeded the two million mark, the highest figure to date. This tells us that more and more of the largest companies in our industry are adopting policies on health and wellness, a very positive sign.

Community counts

In the communities where our members work and live, companies and their employees are taking greater interest than ever in health and wellness issues. The majority of companies responding took part in food bank programmes and donated nearly 93,000 tonnes of food in 2018. To help bring the health and wellness message to young people, members partnered with over 550,000 schools in 2018, a 44% increase over 2016 (the first year the number was tracked).

In 2017, the CGF launched Collaboration for Healthier Lives (CHL) a global movement of stakeholders working together to drive positive behaviour change. Participants work together to provide information and guidance to help citizens create healthier shopping baskets and make healthier choices. To date, five countries – Bogota and Medellin in Colombia; Hagerstown, MD, in the US; Osaka and Kobe in Japan; San José in Costa Rica and several cities in Turkey have been targeted, with more cities and countries participating in coming years. The UK and French collectives will go live with CHL in London and Lyon respectively in 2019, and the Chinese and Mexican teams are developing the initiative for 2019/2020.

CHL is one example of the purpose-driven agenda the CGF is adopting to tackle some of the most pressing issues. The strategy lies in bringing together a diverse set of expertise and assets to find solutions to improve community health.

Winning trust through transparency

To get buy-in for CHL and other initiatives, we will need the trust of the consumer. A key part of winning and maintaining that vital trust is transparency. In “The Honest Product”, a survey of members of both the CGF and the Chartered Institute of Marketing, 90% of corporate respondents said that consumers are more interested in transparency than they were five years ago. A further 95% said that consumer interest in honesty about social, health, environmental, and safety issues will increase in the future.

Our efforts have helped convince more companies of the importance of transparency in labelling. Ethical and political considerations, sensitivities and allergies are changing the way we prepare and consume our foods. Technology has also given consumers unprecedented access to information about ingredients and raw materials. In short, a consumer demanding better information about a product will find it, with or without the cooperation of suppliers, manufacturers and retailers. This makes transparency vital to strong consumer relations.

We are pleased to report that 79% of surveyed members declared that 81%-100% of their food and beverage products display key nutrients information on product packaging. Meanwhile, 84% of respondents said that 81%-100% of their personal care and hygiene product portfolio clearly displays product usages on packaging. This is an impressive 18% increase over last year’s results.

Looking ahead

This report marks the end of the first five-year plan of the CGF’s Health & Wellness Pillar. Last year, the Health & Wellness Steering Committee had their 5-year plan to 2023 approved by the CGF Board of Directors. It builds on the knowledge we have gained to this point and sets new goals for our members.

Health & Wellness Pillar Goals 2023

Collaboration for Healthier Lives model to show impact and results by 2023

- Progress towards healthier baskets and behaviors
- Increased awareness of health and wellness activities and behaviours

1

Independent and scientific validation by recognized third parties on CHL's impact on communities and recognition by international institutions that our industry can play a pivotal role in addressing population health & wellness challenges

2

Sustainable regionalisation plan for Collaboration for Healthier Lives in countries where CGF members can act

3

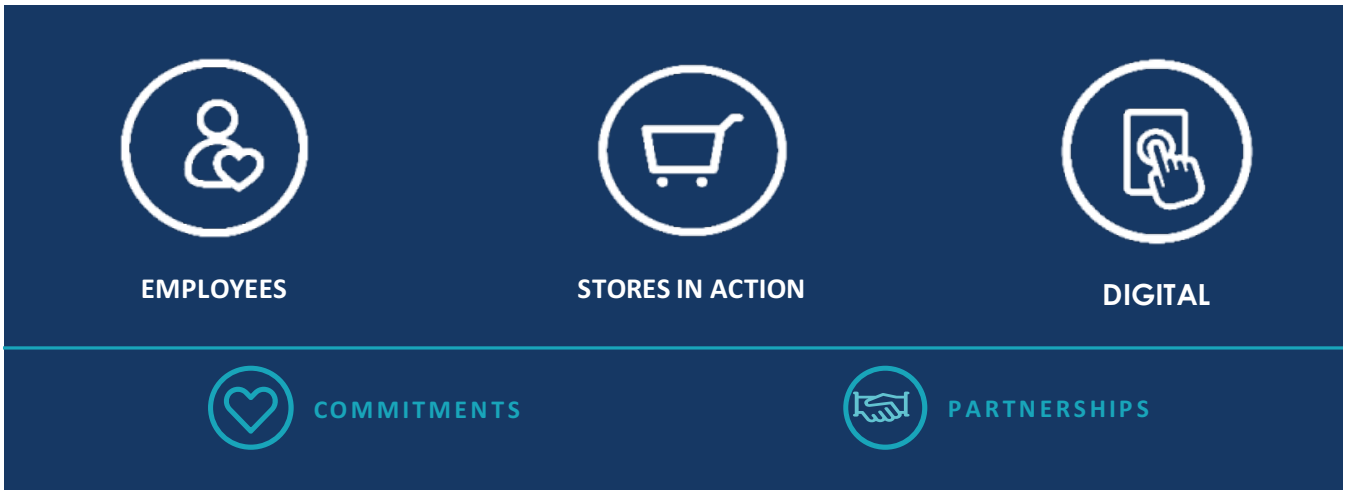
Continued implementation of CGF H&W Commitments and expansion beyond Board member companies

4

Collective action to accelerate Employee Health & Wellbeing at CGF member companies

5

Health & Wellness Strategic Framework



Survey participants*



* Some company logos have been excluded at their request



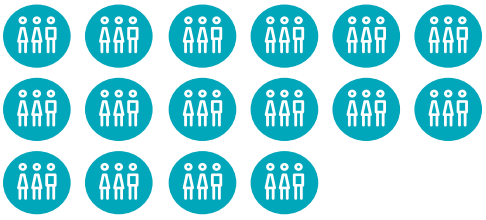
Participation

The 2018 survey set a new record for number of employees represented with over two million worldwide. While the number of participating companies fell (from 83 to 75), the increased number of employees represented shows that the largest member companies are leading the way in addressing health and wellness issues.

Regionally, participation was evenly distributed, meaning that the survey is truly representative of global attitudes on these issues. We were also pleased to have a steady distribution of respondents across categories. This reflects not only the diversity of our membership but also the fact that health and wellness matters to everyone from food and beverage producers to personal care product-makers and the retailers supporting both sectors.

More employees of member companies participated in health and wellness programmes than ever before

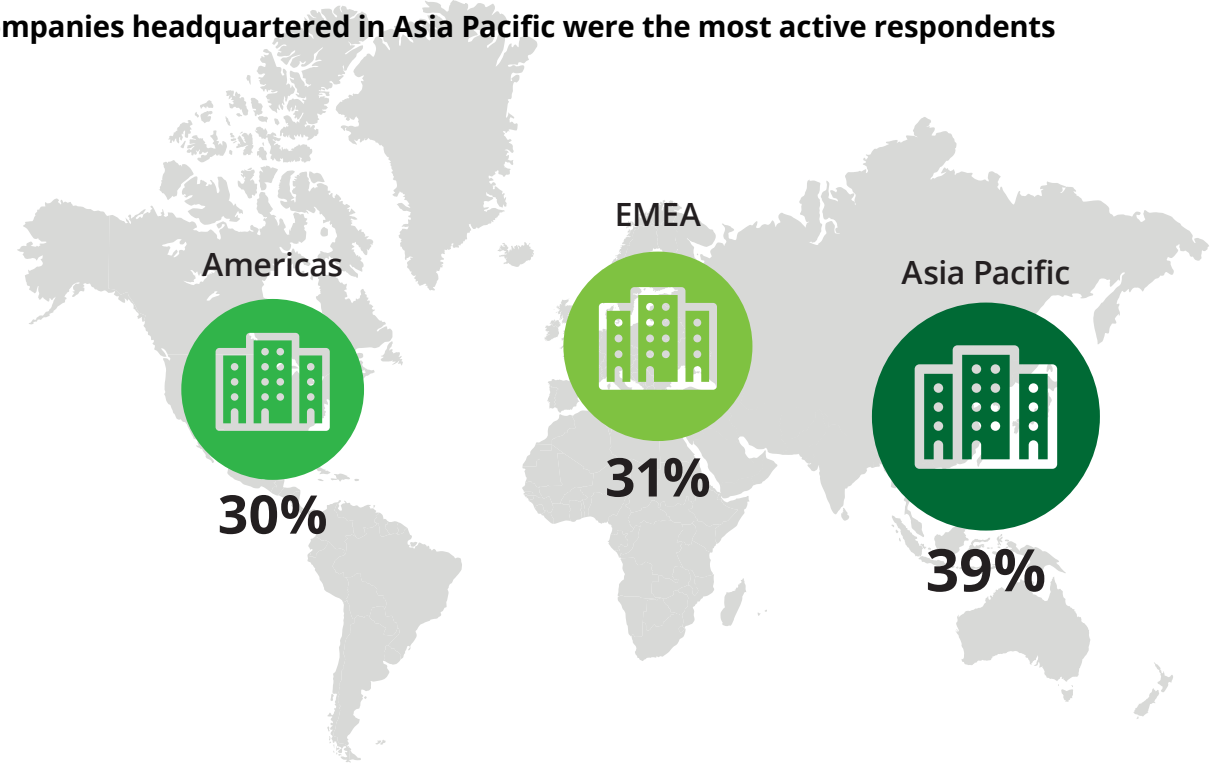
2017 1.6 million



2018 2 million



Companies headquartered in Asia Pacific were the most active respondents



Progress against resolutions

The survey reveals steady progress on the resolutions set out in June 2011. Some resolutions showed near perfect implementation. A closer look at the resolutions follows:

Resolution #1:
Access & Availability of Products and Services

Nearly all (99%) reporting companies said that they were implementing programmes that offer consumers a range of healthier products. This is consistent with previous surveys, demonstrating an industry-wide and lasting commitment to this resolution.

What's more, 93% of companies said that they have a policy or corporate statement aligned with this resolution, while 78% of companies say that they are setting targets or goals to further align with the resolution. This is an encouraging increase over last year's survey.

Resolution #2:
Product Information & Responsible Marketing

Fully 100% of companies surveyed said that they had activated programmes to provide transparent, fact-based information and 76% of companies reported they had altered marketing practices to implement responsible marketing. We also note that 93% of respondents said that they are making their policies on product information available to the public, a marked increase from last year, when 85% volunteered this information.

Resolution #3:
Communication & Education about Healthier Diets and Lifestyles

Every company surveyed said that they had activated communication and educational programmes. A further 80% said that they have a policy or corporate statement that aligns with the resolution and 93% are disclosing their policies to the public, an improvement over last year (85%).

https://www.theconsumergoodsforum.com/initiatives/health-wellness/about/our-commitments/

Commitment completion rates

The survey recorded excellent progress on the four commitments set in 2014. With six surveys complete, we are now able to identify longer-term improvements in the implementation of new programmes to meet the commitments. These include:



Commitment A: Make company policies public on nutrition and product formulation

It is very encouraging that 78% of companies committed to making their policies on nutrition and product formulation public. This is up from 61% last year and 59% since 2015, a remarkable improvement. More companies than ever have undertaken to reformulate a greater percentage of their products to reflect health concerns. Sugar, sodium, and saturated fats remain the major targets.



Commitment B: Implement employee health and wellbeing programmes

Companies are equally committed to employee health and wellbeing, with 85% reporting that they had implemented relevant programmes. This is up from 78% last year and represents a 55% improvement from 2015. Companies in the personal care space were most proactive in this area, with 100% reporting implementation of the commitment.

A further 11% said they would launch programmes in the new year, meaning that nearly all companies will have a programme in place by the end of 2019. It is also noteworthy that nearly half of surveyed companies said their programme offerings are extended to the families of employees.



Commitment C: Industry-wide implementation of consistent product labelling and consumer information to help consumers make informed choices and usages

Progress on this commitment has improved in 2018 with 58% of companies reporting better labelling practices. This represents a huge improvement over 2017 when only 37% had completed the commitment. A further 34% said they had a plan in place and would meet the objectives in the near future.

Again, we are seeing the impact of consumer demand for more product information and the eagerness of our members to meet this push. It should be mentioned that among food and beverage manufacturers, 79% said that most (at least 80%) of their products already displayed information on the label. In the personal care product sector, 84% said that most of their products' labels include use instructions.



Commitment D: Stop marketing communications to children under 12 for food and beverage products that do not fulfil specific nutrition criteria based on scientific evidence and/or applicable national and international dietary guidelines

Once again, our members came through with 76% of companies reporting they had altered marketing practices to implement the commitment. Last year, only 58% of respondents could say the same. Since 2015, the number of companies meeting this commitment has risen 56%. Television advertising has been the main target, though companies are also closely monitoring their internet and social media messaging.

Trends in health and wellness

A smarter consumer

Today's consumer is empowered. They have access to reams of information about the products they bring into their homes. As never before, shoppers can research ingredient lists and use this information to drive decisions. Online review and comment sections allow them to gather product information from third parties. Companies are left with little choice: the more honest the product, the more successful the brand will be.

But transparency is not merely about a list of ingredients. Consumers want to know more about the corporate values espoused by the companies that make these products, including policies on social, environmental, health, and safety issues. In an era when public trust in business is relatively low, traditional keys to success such as taste, health, price, and convenience can be augmented by strong company values in areas such as supply chain sustainability, social purpose, and honest product communication. Many new entrants have found success and are building loyalty by choosing 'radical transparency' over traditional branding tactics.

These were some of the findings of The Honest Product, a study commissioned by the CGF in collaboration with Futerra. The results revealed some significant gaps in the way consumers and producers think about the choices made in grocery or drug stores. For example, 70% of consumers are most interested in transparency as opposed to the 30% of companies that cite transparency as a top priority. In a similar finding, 55% of consumers want more information on corporate values, while 86% of business leaders believe they are already providing enough.

The scope of transparency

What does transparency mean? For consumers, it means knowing not only about the ingredients that go into a product, but also the impact (social, environmental, health) of the product they are buying. This means that a company can be generous to health-related causes but fail to register benefits if its products are perceived by the general consumer to be unhealthy.

The study recommends offering a clear and complete picture. Publicly available information should include product ingredient lists as well as corporate values related to sourcing and manufacturing. Labels should display all certifications (e.g. 100% organic). Some companies choose to reveal charitable donations, others design ad campaigns that include the farmers who grow the raw ingredients for their products.

There are many ways forward, but one thing seems clear: companies that resist transparency risk losing market share. Younger customers with less established brand loyalty are particularly interested in buying products from companies that they perceive to reflect their own values.

Collaboration for Healthier Lives

Health & Wellness is a team effort and to that end, the CGF created Collaboration for Healthier Lives (CHL), a coalition of industry players working together to promote healthier habits.

When considered as a whole, retailers and manufacturers are a powerful force to help address the issues that concern both consumers and health authorities. Retailers benefit from direct contact with consumers and have a unique opportunity to listen and gauge opinions. Manufacturers can then use this feedback to innovate and create new products that respond to market demand.

As part of the health and wellness pillar 5-year plan to 2023 Collaboration for Healthier Lives will develop and grow to report on healthier baskets and behaviour change insights. The Health & Wellness Steering Committee has also developed a global playbook to support local implementation and a global scorecard to showcase progress.

Four community-level projects were launched in 2017. In Bogota, Colombia, CHL launched a programme to provide nutrition, exercise guidance, and education in order to empower consumers to make more informed purchasing decisions. Surveys showed positive impacts on consumer awareness of food groups, labels, portion control, and exercise. CHL then expanded the programme to more stores and cities in 2018.

https://www.theconsumergoodsforum.com/wp-content/uploads/2018/10/CGF-Futerra-Transparency-and-the-Honest-Product.pdf
https://www.theconsumergoodsforum.com/initiatives/health-wellness/key-projects/collaboration-for-healthier-lives/

In Japan, with its aging population, CHL's initiative focused on promoting a healthier lifespan, improving lifestyle habits, moderating salt consumption, and providing free in-store health checks. Surveys reveal the initiative got more people in Osaka and Kobe thinking about dietary habits and their impact on health.

In Turkey, a CHL-led collaboration of 11 manufacturers launched the 'Wellbeing Journey' in April. In stores across the country, the initiative brought awareness about balanced nutrition by letting the customers compare their own shopping basket with an ideal model of calorie distribution. A mobile app sends customers personalised messages of well-being including special offers for products matching their nutritional needs. The second phase of the project started in September 2018, in collaboration with seven manufacturers to focus on oral and dental care.

CHL partnered with Healthy Washington County in Hagerstown, USA to roll out the "One for Good" campaign to support adopting healthier diets and lifestyles. This project is a good example of the CHL collaborating with healthcare authorities to address local concerns.

CHL also engages with academics so that outcomes are properly measured and analysed.

Although this is only the beginning, there are indications that CHL initiatives are also having a positive business impact. In Bogota, for example, the programme generated more repeat business, higher traffic, and positive word-of-mouth for the retailers involved. Similarly, producers promoting healthier products through the initiative saw increases in sales.

The success of the local projects has spurred CHL to launch other pilots in the near future in Singapore, the UK, France, South Africa and Mexico.

Employee health and wellbeing

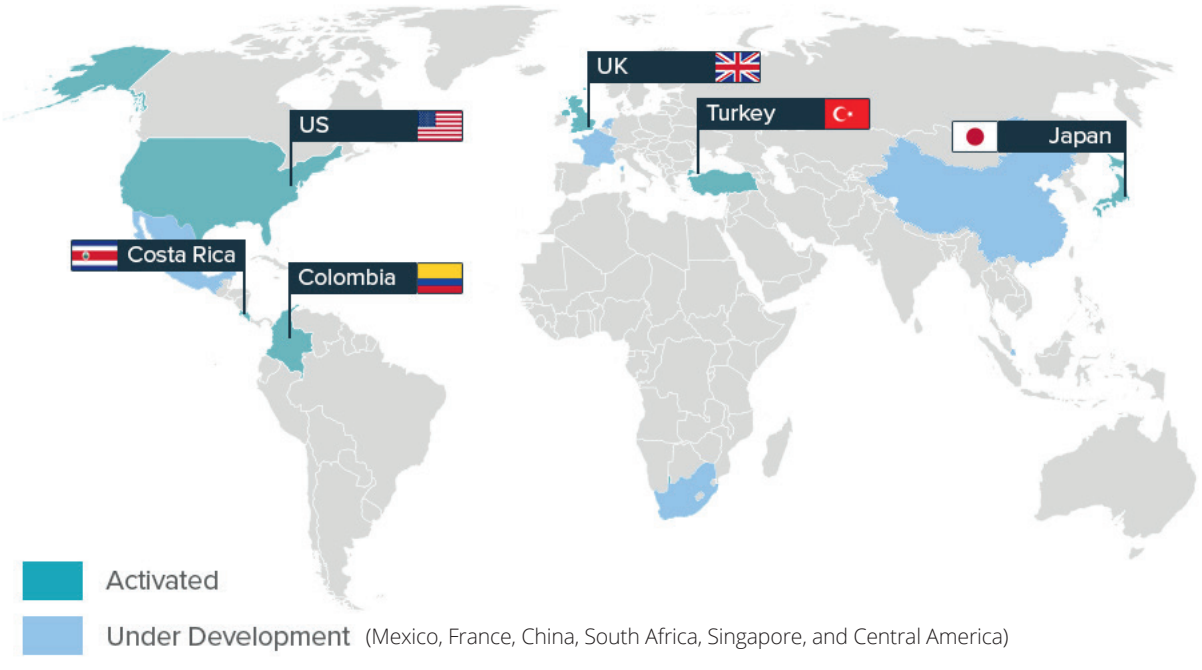
In 2019, the Health & Wellness Pillar will continue to promote the health and wellbeing of the employees (and their families) of our member companies.

The proposed model includes forming partnerships that will give member companies access to expertise on a range of health and wellness topics from mental health, nutitrition, exercise to mindfulness.

With these partners, the CGF will help companies build their own employee programmes. Support will be ongoing with an annual forum to share learning, discuss common challenges, and develop new ideas.

The team's first toolkit on mental health and wellbeing will be presented at the Sustainable Retail Summit in Berlin, October 2019.

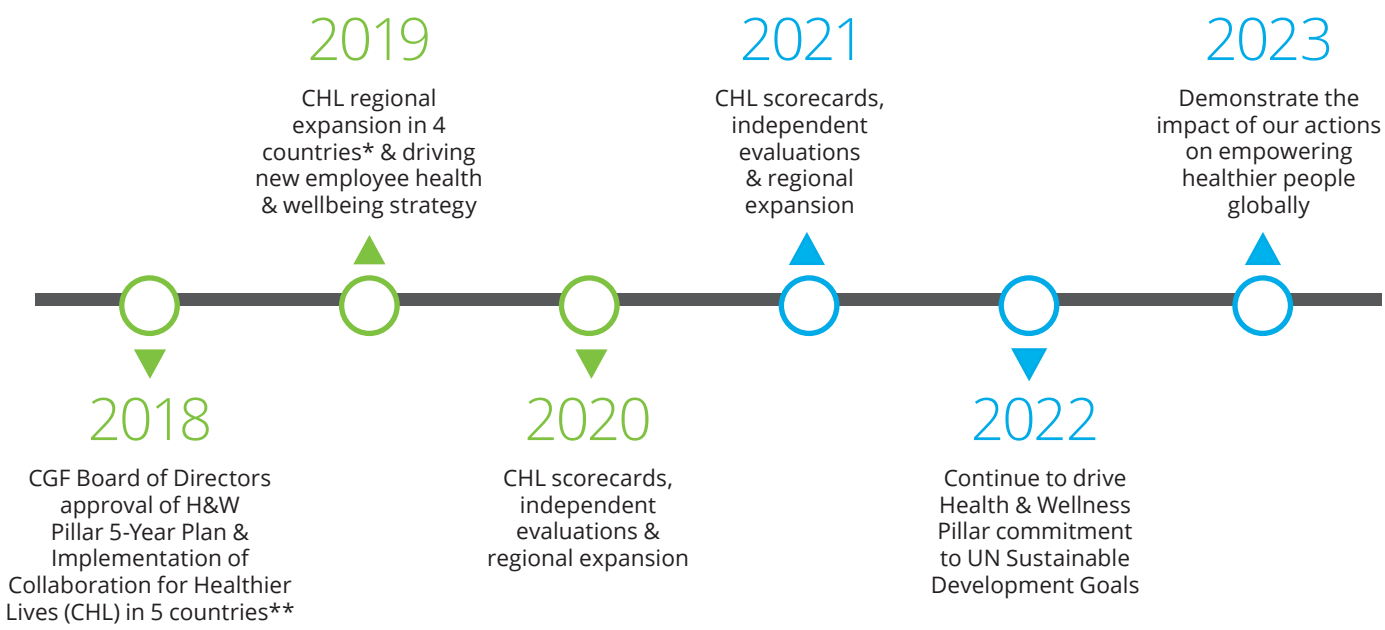
Regional initiatives are currently running in Colombia, Costa Rica, Japan, Mexico, Turkey, the UK, and the US



Next steps

This report represents the end of the Health & Wellness Pillar's first five-year plan. Going forward, the CGF will continue to work with its members and other stakeholders to develop and implement health and wellness programmes that serve companies, employees, customers, and communities. As always, we will closely monitor consumer attitudes to ensure that our members are always current with the trends that affect them most.

Health & Wellness timeline



CGF Health & Wellness pillar implementation roadmap

Up to 2018

- Approval and implementation of H&W Pillar 5-year plan
- Collaboration for Healthier Lives (CHL) regional expansion (Colombia, Costa Rica, USA, Turkey, Japan)

2019

- Publication and country onboarding of Global Framework for Collaboration for Healthier Lives – Playbook and Scorecard
- CHL regional expansion in Mexico, France, UK, Singapore, China and Central America
- Drive digital framework implementation to nudge healthier behaviours
- Drive employee health & wellbeing strategy via partnerships
- Build-up of independent academic partners for CHL evaluation

2020

- Further development of mechanism to report on CHL healthier baskets and behaviour change insights and regional development
- Publication of CHL learnings and best practices
- Health & Wellness Pillar Commitments

2021-2023

- Further development of mechanism to report on CHL healthier baskets and behaviour change insights and publication of CHL learnings and best practices and regional development
- Demonstrate our impact in contributing to the UN Sustainable Development Goals, with a focus on SDG 2 - Zero Hunger, 3 – Health & Wellbeing and 17 – Partnerships, by driving our vision of empowered healthier people and businesses globally.

* France, UK, Mexico, China

** Colombia, Costa Rica, Japan, Turkey, USA

Case studies

Some implementation examples from our members are included in the hyperlinks below:

Delhaize Belgium invited children to re-name familiar vegetables as part of their Magical Vegetables initiative. Mushrooms became "Gnome Trumpets," green beans turned into "Frog Skis" and carrots transformed into "Orange Rockets."

In 2017, **The Coca Cola Company** reduced sugar in more than 300 globally sold drinks, while introducing more than 500 new products across a total beverage portfolio.

Kellogg launched their Global Breakfast Food Beliefs in 2015, setting specific sugar and sodium reduction targets that were achieved in 2016.

PepsiCo's goal for its global beverage portfolio is to see two-thirds with 100 Calories or fewer from added sugars per 12-oz (355 ml) serving. In 2017, 43% of beverages sold in its Top 10 markets met the goal.

NTUC FairPrice Cooperative (Singapore) continues to work closely with suppliers to reformulate their Housebrand products to make them healthier and trans-fat free.

Through its programmes on handwashing, sanitation, oral health, self-esteem and safe drinking water, **Unilever** reached nearly 601 million people from 2010 to 2017.

In 2017, 14.4 million children from 81 countries were reached by **Nestlé's** Healthier Kids programmes and 45 countries participated in their Start Healthy Stay Healthy programme.

Mondelēz International community programmes helped realize a 12% increase in children understanding what good nutrition is, a 6 % increase of children being physical active to at least 30 minutes daily; and 11% increase of children eating more fruits, vegetables and other fresh foods.

Danone implemented 148 education programmes to promote healthy diets and lifestyles targeting over 500 million people.

Ferrero Group developed the project Kinder+Sport to promote active lifestyles among young generations and help convey positive habits through the joyful side of physical activity.

In 2017, during National Brushing Day, **Colgate-Palmolive** Colombia and partners promoted oral health education with more than 407,000 children from more than 2,000 primary schools simultaneously brushing their teeth. A social media campaign helped reach an additional 13 million people across 251 cities.

In 2017, **Nestlé** established a new and stricter Marketing Communication to Children Policy. They reported 100% compliance of Nestlé websites with the EU Pledge and 51 countries were covered by national or regional pledges on marketing foods to children.

Migros Ticaret invited neighborhood children to learn about the importance of fresh foods, proper exercise, and healthy and

smart shopping techniques. In 2016 and 2017 with tours implemented in 205 stores in Turkey, 81,000 children received Good Living training.

The **Pick n Pay** *School Club* programme supplies teaching resources, worksheets, workbooks and posters to 3025 schools in South Africa, and reaches 2.2 million learners. The resources incorporate health messaging and nutrition education, encouraging healthy eating and an active lifestyle.

L'Oréal launched its *Share & Care* programme to implement a common set of social benefits in all subsidiaries. The four key pillars covered are social protection, healthcare, parenthood and quality of life at work.

The "Great For You" icon was developed by **Walmart** in the US to help customers instantly identify food options that are better for them. Today, more than 30% percent of qualifying items now carry the "Great For You" icon.

At **Unilever**, the Lamplighter employee health programme addresses the top four health risks across the business: physical health, exercise, nutrition and mental resilience. In 2017, 75,000 employees from 74 countries enrolled on the programme.

Under the sì.mediterraneo project, **Barilla** develops environmentally sustainable and nutritionally balanced menus for its cafeterias. The programme has resulted in a significant increase in the consumption of wholegrain ingredients and white meats, and a substantial reduction in orders for red meat.

Grupo Bimbo created its I Live Healthily #ItsForMe programme in 2016, with the purpose of motivating employees to follow healthier lifestyles. More than 20,000 associates who joined the "I Accept the Challenge" ("Acepto el Reto") initiative in 2017, lost over 5 metric tonnes in weight.

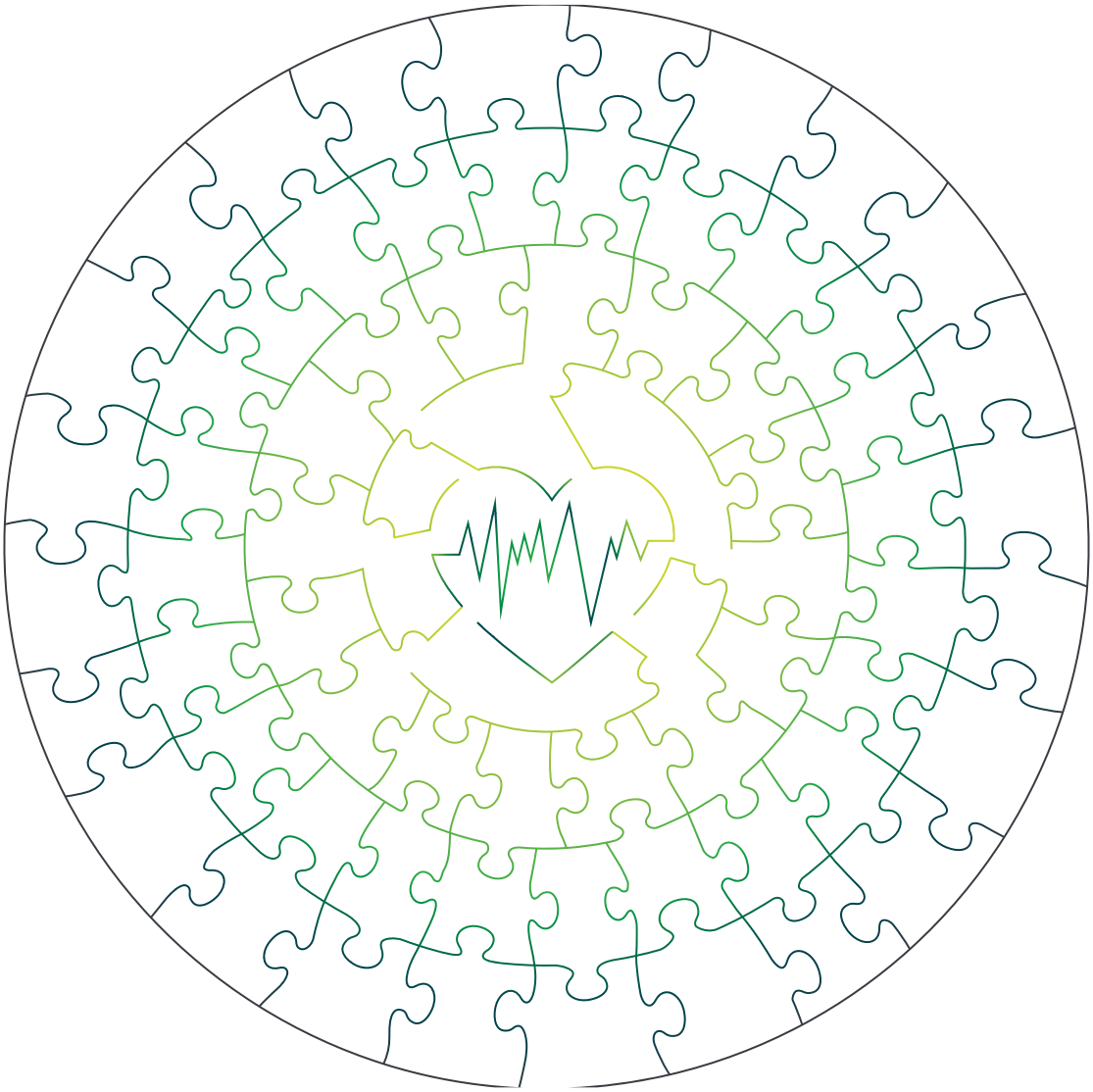
By the end of 2017, 48 out of 50 **Danone** subsidiaries had an active "Health@Work" programme which 62,802 employees had access to, representing 81% of the total staff.

Healthy Living, **PepsiCo's** well-being programme, is designed to help employees and families improve their physical, financial and emotional health. Employees can choose from a variety of programmes to help them "Be Well", "Find Balance", and "Get Involved".

Colgate-Palmolive Company offers employees the opportunity to participate in local health fairs around the globe that provide education on benefits and local wellness programmes and biometrics.

In 2018, **Woolworths** re-launched their Fresh Food Kids programme with the ambition to make it fun and easy for kids to eat fruit and vegetables every day.

In 2017, **Nestlé** reported 4,613 breastfeeding rooms for public use in India, Bangladesh and China; 339 breastfeeding rooms on Nestlé sites globally and 26 countries undertook internal and external WHO Code compliance audits.



Acknowledgments

Health & Wellness Measurement and Reporting Taskforce

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Health & Wellness Steering Committee

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Julie Greene, *Ahold Delhaiz*
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Robert Ciati, *Barilla*
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About The Consumer Goods Forum

The Consumer Goods Forum (CGF) is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serves the consumer goods industry worldwide. It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 3.5 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 50 manufacturer and retailer CEOs. For more information, please visit: www.theconsumergoodsforum.com

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