

# Strategies used by the soft drink industry to grow and sustain sales: a case-study of The Coca-Cola Company in East Asia

Oliver Huse,<sup>1</sup> Erica Reeve,<sup>1</sup> Colin Bell,<sup>1</sup> Gary Sacks,<sup>1</sup> Phillip Baker,<sup>2</sup> Benjamin Wood,<sup>1</sup> Kathryn Backholer<sup>1</sup>

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<sup>1</sup>Global Centre for Preventive Health and Nutrition, Institute for Health Transformation, Faculty of Health, Deakin University, Geelong, Victoria, Australia

<sup>2</sup>Institute for Physical Activity and Nutrition, Deakin University, Melbourne, Victoria, Australia

## Correspondence to

Oliver Huse;  
[oliver.huse@deakin.edu.au](mailto:oliver.huse@deakin.edu.au)

## ABSTRACT

**Background** The market and non-market activities of the food and beverage industry contribute to unhealthy and unsustainable dietary patterns, increasingly in low-income and middle-income countries (LMICs). We aimed to describe how The Coca-Cola Company (TCCC), as the world market leader in the sugar-sweetened beverage sector, operationalises their activities in LMICs in East Asia, among the world's most highly populated yet under-researched countries, to illustrate the ways in which these activities may negatively influence health outcomes.

**Methods** We adopted a theoretically-guided qualitative research design and documentary analysis method. Data sources included: industry documents and web pages, marketing case studies obtained from the World Advertising Research Centre, media reports, global trade summaries and websites of industry associations. To guide data analysis, we synthesised a conceptual framework from existing commercial determinants of health literature, to describe ways in which the market and non-market activities of TCCC influence health.

**Results** TCCC leverages subsidiary companies and investments in international networks to expand its supply chains. The company engages in frequent political activities to minimise the implementation of nutrition policies that may impact profits. The company markets products, particularly on digital and mobile devices, often targeting children, adolescents and mothers, and undertakes public relations activities related to human rights, environmental sustainability and community and economic supports, and these public relations activities are often integrated into marketing campaigns. The identified activities of TCCC are frequently in direct contrast to efforts to improve the healthfulness of population diets in East Asia LMICs.

**Conclusions** A public health analysis of the market and non-market activities of corporations active in unhealthy commodity industries needs to be broad in scope to cover the diverse set of strategies used to increase their market power and influence. Governments should consider a suite of policy options to attenuate these commercial determinants of unhealthy diets.

## WHAT IS ALREADY KNOWN ON THIS TOPIC

⇒ A key driver of the growing burden of unhealthy diets and related non-communicable diseases in low-income and middle-income countries is the growing reach, power and influence of the transnational ultra-processed food and beverage industry.

## WHAT THIS STUDY ADDS

⇒ The Coca-Cola Company, as a case study for the actions of other ultra-processed beverage corporations, has identified low-income and middle-income countries in East Asia as a key growth market.  
⇒ The Coca-Cola Company engages in a range of market and non-market activities to drive the sale of its products, including expansive supply chains, corporate political activities, broad and influential marketing campaigns and public relations activities.  
⇒ The Coca-Cola Company's market and non-market activities in East Asian low-income and middle-income countries present a risk to health and may undermine health promotion efforts.

## HOW THIS STUDY MIGHT AFFECT RESEARCH, PRACTICE OR POLICY

⇒ Governments should consider a suite of policy options to address the growing influence of transnational ultra-processed food and beverage corporations to improve population diets and health.

## BACKGROUND

Ultra-processed foods and beverages (from hereon ultra-processed foods (UPFs)) are becoming increasingly prominent in human diets worldwide, with major implications for human and planetary health.<sup>1 2</sup> Diets high in UPFs, which are typically high in fat, salt and sugar, are associated with multiple adverse health outcomes, including overweight and obesity, cardiovascular disease; cancer, type 2 diabetes, depression and all-cause mortality.<sup>3-5</sup> Of the UPFs, sugar-sweetened beverages in particular are linked with rising

incidence and prevalence of overweight and obesity, and type 2 diabetes.<sup>6–8</sup>

Countries in East Asia are experiencing an increased burden of diet-related non-communicable diseases (NCDs), including type two diabetes,<sup>9–13</sup> liver disease,<sup>10,14</sup> cardiovascular disease<sup>10–13,15</sup> and others.<sup>10,12,13</sup> This coincides with an increase in obesity prevalence and a nutrition transition: a shift in diets away from traditional foods and beverages, towards a greater consumption of animal products, caloric sweeteners, refined carbohydrates, vegetable oils and UPFs.<sup>16–20</sup> Such changes in dietary patterns are accompanied by shifts in food systems, including a shift from home-production and local wet markets to supermarkets and modern convenience stores acting as the primary food retail outlets,<sup>11,21</sup> new food transport, storage and processing technologies emerging<sup>22,23</sup> and increased domestic production of UPFs.<sup>24,25</sup> These dietary shifts also have serious implications for sustainable development.<sup>10,14,15,26,27</sup> Increased consumption of UPFs has been associated with increased greenhouse gas emissions and pollution.<sup>28–30</sup> As such, any actions to drive a healthy nutrition transition can support a sustainable food systems agenda.<sup>29,30</sup>

A key driver of the nutrition transition and the growing burden of NCDs in Asia and other low-income and middle-income countries (LMICs) is the growing reach, power and influence of the transnational UPF industry.<sup>31–33</sup> As this industry has grown worldwide, this has had direct consequences on population diets,<sup>31,34</sup> overweight and obesity<sup>35,36</sup> and NCDs.<sup>33,37</sup> The UPF industry includes all companies involved in the production and sale of UPFs globally. This includes transnational corporations that manufacture, market and sell these products, the domestic companies that emulate them, the trade, market and political associations that represent them and suppliers of production input commodities, such as the palm oil and sugar industries.<sup>1</sup> Hereafter, we refer to the UPF industry as transnational and domestic corporations involved in the production, marketing and distribution of UPFs. The goal of UPF corporations is to grow profits and generate shareholder returns through a range of activities.<sup>38</sup>

A growing body of literature supports the notion that the activities of unhealthy corporations and industries, including the UPF industry, can influence population health.<sup>31–33</sup> In 2016, Kickbusch *et al.*<sup>39</sup> described the four activities through which corporations commonly exert their influence on health; supply chains, lobbying (corporate political activities), marketing and public relations (PR). They labelled these corporate activities the ‘commercial determinants of health’, or the ‘strategies and approaches used by the private sector to promote products and choices that are detrimental to health’.<sup>39</sup> UPF corporations, among others, have worked, and continue to work, to expand into new markets and promote consumption of their products, and undermine political efforts aimed at curbing consumption of their products.<sup>31–33,39–42</sup> The UPF industry is pursuing new growth opportunities in markets

of LMICs, attracted by large, young and urbanising populations with rising incomes, and as markets in high-income countries have stagnated, or even declined.<sup>1,31,43–45</sup> This industry engages in a range of market and non-market strategies to drive expansion and product sales.

Market strategies can be defined as patterns of corporate activities in the market environment that are undertaken with the aim of improving corporate performance.<sup>38,46</sup> In this case, improving corporate performance refers to maximising profits and shareholder returns.<sup>38</sup> Previous research has described the ways in which marketing is used by UPF corporations to increase the desirability of their products and therefore, market share and consumption,<sup>47–51</sup> though more recent research has highlighted other market-based corporate activities, including those relating to supply chains.<sup>38</sup>

Non-market strategies are the corporate activities designed to improve corporate performance by influencing the political, institutional and broader sociopolitical structures that shape market environments.<sup>38,46</sup> A key example of the non-market activities of UPF corporations is the corporate political activities that minimise political barriers to sales and profits, and substantive research has described the underlying global and institutional drivers that support corporate political activities.<sup>52–57</sup> Beyond corporate political activities, the non-market activities of UPF corporations also include the PR activities aimed at shifting policymakers’ and public perceptions.<sup>58,59</sup> Though we distinguish between the market and non-market activities of UPF corporations, many corporate activities have both market and non-market dimensions.<sup>38,46</sup> For example, corporate PR activities can build brand loyalty,<sup>39–41</sup> a market-based activity, but also influence policy makers and public perceptions,<sup>52</sup> a non-market activity.

Previous studies have examined the various market and non-market activities of the UPF industry, but these often describe single activities, such as political lobbying or digital marketing, with limited integration of the ways in which corporations leverage both market and non-market activities to influence population diets and health.<sup>18,25,45,60–67</sup> East Asia is one region where corporate activities have been under-researched. The aim of this study is to describe the range of market and non-market activities used by The Coca-Cola Company (TCCC) in East Asia LMICs, and the likely impact of these activities on food systems, population diets and subsequently public health.<sup>68</sup> TCCC was selected as a case study for the actions of the broader ultra-processed beverage (UPB) industry as it is the largest UPB corporation in LMICs in the East Asia region.<sup>69</sup> To help realise this aim, this study was guided by a conceptual framework, derived from existing frameworks, which identifies specific market and non-market activities of corporations, as they relate to population health.

## METHODS

We used a theoretically-guided qualitative research design,<sup>70</sup> and a documentary analysis method to

systematically identify and synthesise *how* TCCC operationalises corporate activities to grow, sustain and protect its markets within East Asian LMICs. To guide data analysis, we synthesised a conceptual framework from existing commercial determinants of health literature, to describe ways in which the market and non-market activities of TCCC influence health.<sup>38 39 52 58 59 71 72</sup> A systematic document synthesis<sup>70</sup> was undertaken, searching industry documents, marketing case studies, media reports, global trade summaries and websites of country and region-specific food and beverage industry associations. TCCC's corporate activities were extracted from the documentary data sources and deductively coded according to the conceptual framework.

### Context

For this study, we focused on LMICs in East Asia. We refer to East Asia as countries that fall under the traditional definitions of both the South-East Asia and East Asia regions.<sup>73</sup> LMICs are defined by World Bank lending classifications as countries with a Gross National Income between US\$1046 and US\$4095 per capita.<sup>73</sup> The countries included in this study were; Cambodia, Indonesia, Lao People's Democratic Republic, Mongolia, Myanmar, Papua New Guinea (PNG), Philippines, Timor-Leste and Viet Nam.

We focused on the largest UPB corporation in LMICs in the East Asia region as a case study for the actions of other large transnational UPB corporations. This corporation is TCCC<sup>68</sup> and related subsidiaries and bottling corporations as it is consistently in the top three largest corporations, in terms of UPB market share, for all included countries for which data was available.<sup>69</sup> TCCC is most known for its synonymous beverage product, but through development and purchasing of new brands, it now manufactures and distributes a range of soft drinks, energy drinks, sports drinks, bottled waters and other beverage products.<sup>68</sup> TCCC products are produced through 'bottlers' or bottling operations which produce and package TCCC products. TCCC does not directly own most of the companies that bottle its products around the world.

Instead, TCCC relies on equity stakes and franchising agreements to exert influence over the corporate governance of many of its key bottlers.<sup>74</sup> Through equity stakes, TCCC maintains a degree of ownership over bottlers and has a say in decision-making processes. Through franchising agreements TCCC does maintain ownership over bottlers but can set out the terms by which TCCC beverages are produced and distributed. Importantly, this ownership structure means that TCCC does not have to take full responsibility for bottling operations and associated financial risks.<sup>75</sup>

### Conceptual framework

Kickbusch *et al*<sup>39</sup> identify the four activities through which corporations exert their influence on health as supply chains, lobbying (corporate political activities),

marketing and PR. The 'Kickbusch commercial determinants of health framework'<sup>39</sup> has been critiqued for excluding corporate power, market structure and consumer agency.<sup>40 76 77</sup> Recognising these limitations, we added to these constructs from other conceptual frameworks to further explore supply chain, marketing, corporate political activities and PR activities, to provide more depth to the collection and analysis of data (table 1).

Supply chains include the means by which food is produced, processed, stored, transported and distributed to and through their final place of sale and/or consumption.<sup>78</sup> Through their expanding supply chains, the UPF industry distributes their products to widening populations of consumers.<sup>39–41</sup> Our analysis in the area of 'supply chains' was informed by a framework that describes the multiple ways in which corporations seek to control food and beverage supply chains.<sup>38</sup> However, as we were interested in TCCC's influence over downstream processes and distribution, we chose to condense this framework and contextual 'supply chain' activities as (1) activities to expand and control bottlers and other manufacturers and (2) activities to expand and control distribution networks and retailers. These have been described as two key aspects of supply chain control as it relates to the soft drink market.<sup>38</sup>

We defined 'corporate political activities' as corporate attempts to influence government food and nutrition policy in ways favourable to the corporation. The UPF industry lobbies to slow down or avoid government regulations, such as taxes and marketing restrictions, that may ultimately have a negative impact on the sales of their products.<sup>34 39–41 52 79</sup> The scope of our analysis of 'corporate political activities' was informed by a Corporate Political Activity framework which has previously been suggested for use in monitoring food and beverage industry corporate activity.<sup>52</sup> This framework defines corporate political activities as relating to information and messaging, financial incentives, constituency building, legal strategies and policy substitution.

Through marketing, the UPF industry aims to increase the desirability of their products and therefore market share and consumption.<sup>47–51</sup> The scope of 'marketing' was refined to focus on marketing 'campaigns'; organised activities designed to promote and sell a specific product or brand. Analysis of these campaigns was informed by frameworks that have identified several key components of food and beverage marketing strategies, including the target audience, the marketing technique (such as celebrity endorsements, sports sponsorship or cultural associations or alignment), the marketing media and marketing outcomes.<sup>71 72</sup>

Our analysis in the area of 'PR' focused largely on examination of corporate social responsibility (CSR) initiatives conducted by TCCC. Corporations ostensibly conduct CSR activities to support consumers, employees, the community, the environment, the economy and/or human rights.<sup>58 59</sup> However, taking a critical stance, we included CSR activities under the category of PR, in

**Table 1** Guiding analytical framework

Corporate activities	Actions	Description
Supply chains <sup>38</sup>	Activities to expand and control bottlers and manufacturers	Purchasing rival corporations in countries of interest. Investment in subsidiary firms to control sale and distribution of products and licensing.
	Activities to expand and control downstream processes	Boosting production capabilities in countries of interest. Investment in actors and processes that improve supply chain logistics. Strategic partnerships and agreements that improve supply chain logistics.
Marketing <sup>71 72</sup>	Target audience	The primary audience that a marketing campaign aims to increase consumption.
	Marketing technique	The social or cultural levers that the marketing campaign engages to increase consumption, such as cultural engagement, sports sponsorship, celebrity endorsements.
	Marketing media	The media channel through which the marketing campaign is broadcast, such as online and social media, television, or outdoor advertising.
	Marketing outcomes	The gains that a corporation receives from a marketing campaign, including both financial and social metrics.
Corporate political activities <sup>52</sup>	Information and messaging	Framing policy debates to support corporate interests, through use of evidence, promoting alternative policies and highlighting the economic importance of the industry.
	Financial incentives	Providing donations, gifts or other financial incentives to policymakers.
	Constituency building	Amplifying industry voices through forming coalitions, and partnerships with policymakers and the community.
	Legal strategies	Litigating or threatening litigation against governments, organisations or individuals in response to policy.
	Policy substitution	Proposing and promoting industry-backed policy alternatives.
Public relations <sup>58 59</sup>	PR activities relating to the environment	Industry commitment to sustainability and preserving the environment.
	PR activities relating to consumers	Industry commitment to maximising the well-being of and value received by customers.
	PR activities relating to the community	Industry commitment to the broader community, commonly through supporting small businesses and education and training initiatives.
	PR activities relating to the company's employees	Industry commitment to maximising employee well-being.
	PR activities relating to the economy	Industry commitment to sustaining and growing the economy, and acknowledgement of industry's role within the economy.
	PR activities relating to human rights	Industry commitment to bettering human rights and advancing equality causes.
PR, public relations.		

recognition that, in many cases, the primary purpose of CSR activities is to favourably promote the reputation of a company, and, in the case of companies in unhealthy industries, may serve to distract from the negative health effects of their products.<sup>39–41</sup> We conceptualised TCCC's PR activities by drawing on a PR framework that has been previously used to describe the food and beverage industry's PR activities relating to consumers, employees, the community, the environment, the economy and human rights.<sup>58 59</sup>

## Literature search

### Data sources

Relevant data sources were identified based on prior studies examining corporate activities of the alcohol, food and beverage and the tobacco industries.<sup>37 80–83</sup> We limited the search to publicly available documents published since 2000 to reflect contemporary commercial activities. Data sources included: industry documents (TCCC annual and quarterly reports, transcripts from shareholder meetings and TCCC internal communications)

obtained from TCCC's company website and the Food Industry Documents Library,<sup>84</sup> marketing case studies obtained from the World Advertising Research Centre (WARC),<sup>85</sup> media reports obtained from Factiva,<sup>86</sup> global trade summaries obtained from the World Trade Organization (WTO)<sup>87</sup> and websites of country and region-specific food and beverage industry associations of which TCCC is a member.<sup>88–92</sup> The WARC database includes select, commonly award-winning, marketing case-studies.<sup>85</sup> These case-studies describe marketing techniques, target markets, campaign return on investment.

While food and beverage industry associations exist and operate globally, we chose to focus this search on country and region-specific groups. These were identified through an existing list of global food and beverage associations,<sup>93</sup> which was refined by country/region and by groups which included TCCC as a member. Included country-specific food and beverage industry associations were Gabungan Produsen Makanan Minuman Indonesia (GAPMMI), the Indonesia-based *Association of Indonesian Food and Beverage Entrepreneurs*<sup>92</sup>; the American Chamber of Commerce in Viet Nam,<sup>89</sup> and the Philippines Chamber of Food Manufacturers.<sup>90</sup> Included regional food and beverage industry associations were the ASEAN Food and Beverage Alliance<sup>88</sup> and Food Industry Asia.<sup>91</sup> The websites of these industry associations were searched for reports of activities aligning with the chosen corporate political activity framework.<sup>52</sup>

Included databases (the Food Industry Documents Library,<sup>84</sup> WARC<sup>85</sup> and Factiva<sup>86</sup>) were searched using

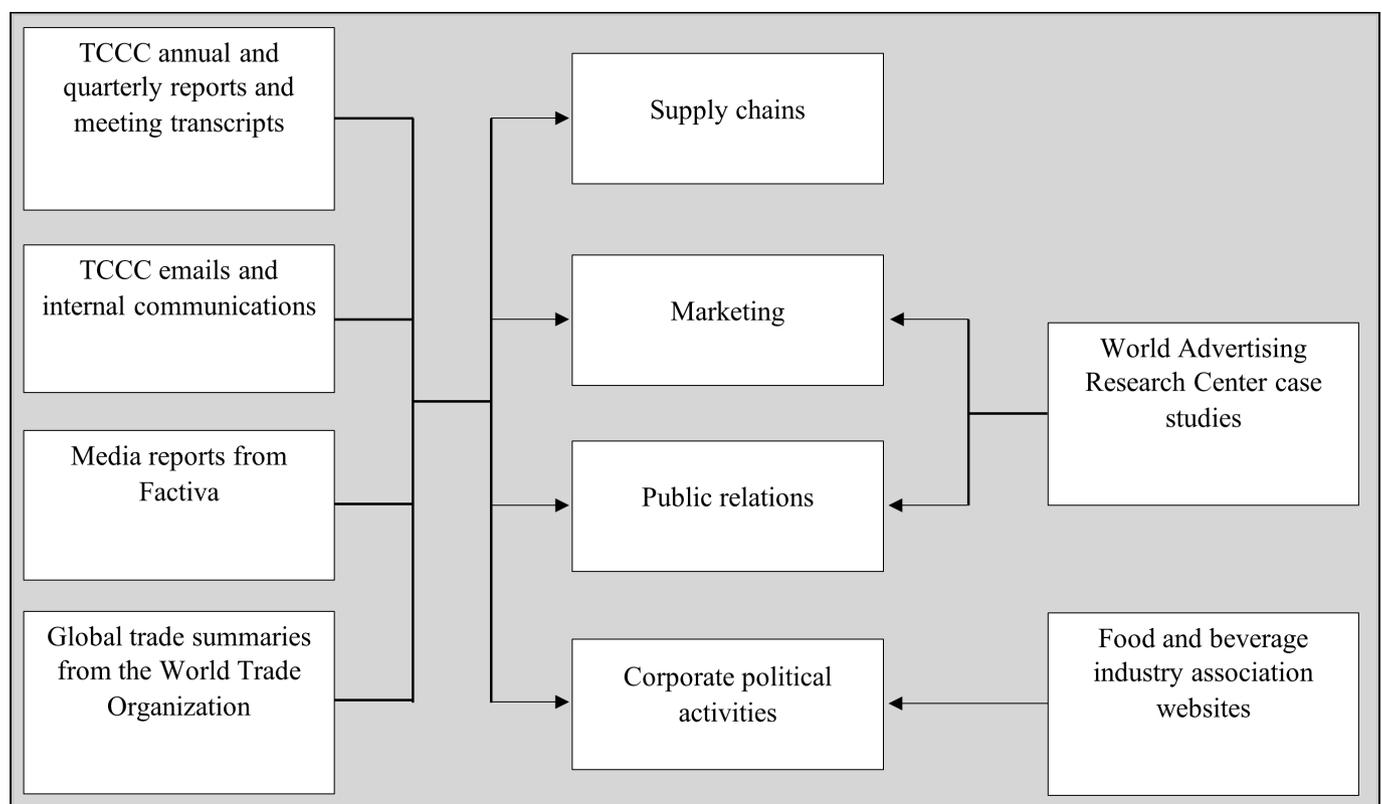
the keywords 'Coca-Cola' and 'Coke', combined with the names of all included countries. To narrow the scope of the articles returned from Factiva, only the first 300 most relevant articles, as sorted by Factiva, were searched for each country.

#### Data analysis

TCCC's corporate activities<sup>39</sup> were extracted from the documentary data sources and deductively coded according to the framework presented in table 1, facilitated by the qualitative data management software NVivo V.11.<sup>94</sup> Industry activities that did not align with the framework were inductively coded. Data was narratively synthesised to describe in detail TCCC's actions to influence markets in East Asian LMICs, against each of the three main corporate activities. To verify the coding framework and results, a second author coded some of the identified documents (n=11).

#### RESULTS

Retrieved documents included company annual and quarterly reports and meeting transcripts from TCCC's company website and the Food Industry Documents Library<sup>84</sup> (n=216), company emails and internal communications (n=54), marketing case studies from WARC<sup>85</sup> (n=67), media reports from Factiva<sup>86</sup> (n=260), global trade summaries (from the WTO<sup>87</sup>) (n=3) and websites of country and region-specific food and beverage industry associations<sup>88–92</sup> (n=5) (figure 1).



**Figure 1** Data sources and corresponding inputs into conceptual framework. TCCC, The Coca-Cola Company.

**Table 2** Summary of TCCC corporate activities in East Asian LMICs

Corporate activities	Actions	Example
Supply chains <sup>38</sup>	Activities to expand and control bottlers and manufacturers	TCCC reported on finalising the purchase of the remaining 65% ownership stake in <i>Coca-Cola Bottlers Philippines, Inc.</i> from <i>San Miguel Corporation</i> . <sup>95</sup>
	Activities to expand and control downstream processes	TCCC partnered with the Philippines Department of Trade and Industry to provide financing to sari-sari stores, the primary distribution channel for TCCC's products. <sup>105</sup>
Marketing <sup>71 72</sup>	Target audience	TCCC reports that younger consumers are the current and future driver of the success of the company. <sup>123</sup>
	Marketing technique	TCCC describes how the 'Happiest Thank You' campaign in the Philippines capitalised on feelings of gratefulness to encourage individuals to 'thank' their friends and colleagues by gifting personalised cans. <sup>132</sup>
	Marketing media	23 of the 41 marketing campaigns identified used either mobile or social media and online advertising as their primary means of marketing. For example, the 'President for Happiness' campaign in the Philippines. <sup>130</sup>
Corporate political activities <sup>52</sup>	Constituency building	The Philippines Chamber of Food Manufacturers' website reports on upwards of 30 meetings with government agencies between 2014 and 2021. <sup>107</sup>
	Information and messaging	The American Chamber of Commerce in Viet Nam relied heavily on evidence stating that beverage carbonation may actually be beneficial in combating obesity to oppose a proposed carbonated beverages tax. <sup>113</sup>
	Legal strategies	The Philippines Chamber of Food Manufacturers made the claim that a proposed two-tier sugar-sweetened beverage tax was 'illegal'. <sup>116</sup>
	Policy substitution	Food Industry Asia takes the stance that food and nutrition labelling should be voluntary and industry-led. <sup>119</sup>
Public relations <sup>58 59</sup>	PR activities relating to the environment	TCCC reports on the creation of a US\$19 million bottle-to-bottle recycling facility in the Philippines. <sup>142</sup>
	PR activities relating to the community	TCCC has funded over 100 'Little Red Schoolhouses' in the Philippines. <sup>136</sup>
	PR activities relating to the economy	TCCC claimed that its three bottling operations in Viet Nam indirectly contributed to more than 15 000 jobs across multiple industries. <sup>138</sup>
	PR activities relating to human rights	TCCC details its allocation of US\$3 million to COVID-19 relief efforts in the Philippines. <sup>139</sup>

LMICs, low-income and middle-income countries; PR, public relations; TCCC, The Coca-Cola Company.

**Table 2** summarises TCCC's corporate activities in East Asian LMICs.

### Supply chain activities

Through expanding their supply chains, TCCC increases distribution networks and allows their products to be sold to a greater range of consumers.<sup>25 39–41</sup> More than this, foreign direct investment by firms such as TCCC reduces costs and allows for distribution efficiencies.<sup>25</sup>

A total of 33 unique supply chain activities conducted by TCCC in East Asia LMICs since 2000 were identified (online supplemental appendix 1).

#### Activities to expand and control bottlers and manufacturers

At the core of TCCC's supply chain control in East Asia is the ownership of controlling interests in local subsidiary bottling operations and franchising agreements with other bottlers. In East Asian LMICs, TCCC has maintained equity stakes in bottling operations, preferring to establish operations in emerging markets prior to relinquishing risk to franchisees.<sup>74</sup> This is the case in Cambodia, Myanmar, the Philippines and Viet Nam.

For example, in 2007, TCCC reported on finalising the purchase of the remaining 65% ownership stake in *Coca-Cola Bottlers Philippines* from *San Miguel Corporation*<sup>95</sup>:

In December 2006, the Company entered into a purchase agreement with San Miguel Corporation and two of its subsidiaries (collectively, "SMC") to acquire all of the shares of capital stock of Coca-Cola Bottlers Philippines, Inc. ("CCBPI"). TCCC 2006 Fourth Quarter Report

Ownership of subsidiary corporations provides TCCC with widespread reach across East Asian LMICs. For example, TCCC reported on ownership of shares in subsidiary bottler, Coca-Cola Amatil. Coca-Cola Amatil's supply chains reached 86% of the population of PNG and 98% of the population of Indonesia and in 2005 approximately 51% of Coca-Cola Amatil's sales volume was TCCC Trademark Beverages.<sup>96</sup> Just as TCCC purchases subsidiary bottlers, it frequently sells bottling operations to subsidiary companies. TCCC reports that through the sale of bottling operations, TCCC can reduce its operational costs and make the most of financial incentives. For example, TCCC reported selling bottling operations

in Viet Nam and Cambodia to Coca-Cola Sabco, a subsidiary company, in 2004, with Coca-Cola Sabco assuming certain debts as well.<sup>97</sup> In 2012, TCCC repurchased these operations from Coca-Cola Sabco.<sup>98</sup>

While TCCC still maintains equity stakes in many bottlers in East Asian LMICs, in some markets the firm has allowed franchisees to acquire strategic ownership over markets. In these cases, including Indonesia and PNG, TCCC corporation sells concentrates and syrups to franchisees, and also receives a share of profits from beverage sales through licensing.<sup>74</sup> Specifically, in 2021 TCCC sold its share in Coca-Cola Amatil's operations to its European partners.<sup>99</sup> As Coca-Cola Amatil was TCCC's primary bottler in both Indonesia and PNG, this sale represents TCCC transferring primary ownership and day-to-day control to a franchisee, though TCCC maintains substantive control through franchise agreements.<sup>74</sup>

TCCC also engages in foreign direct investment to integrate non-TCCC corporations into TCCC supply chains. For example, TCCC reports on its acquisition of Cosmos Bottling Corporation in the Philippines.<sup>100</sup> Such purchases result in increased sales and revenue. TCCC annual reports state that the company's acquisition of Cosmos Bottling Corporation brought the corporation's 500-million-unit case sales volume to TCCC.

TCCC continually engages in foreign direct investment to advance new and existing production facilities. For example, TCCC reports on its opening of two new production lines at one of its bottling facilities in Indonesia in 2015<sup>101</sup>:

In April this year, Coca-Cola Amatil Indonesia, part of US beverage manufacturer the Coca-Cola Company, added two new production lines at its Cikedokan plant in Bekasi, West Java. Coca-Cola News Digest, 22 June 2015

Likewise, TCCC also reports on its opening of a new bottling plant in Myanmar as a part of a US\$200 million investment in 2013.<sup>102</sup> TCCC implies that this investment was facilitated by the opening of Myanmar to international corporations:

We opened a new bottling plant in Myanmar as part of our planned US\$200 million investment in the country over the next 5 years. Coca-Cola is now being produced locally in Myanmar for the first time in more than 60 years. TCCC 2013 Annual Report

#### Activities to expand and control downstream processes

TCCC corporation invests significant funds in ensuring control over the necessary downstream actors and processes to maximise the firm's ability to distribute and sell its products. For example, TCCC recounted its investment of US\$500 million in its Indonesia operations in 2014.<sup>103</sup> The corporation noted that, among other things, these funds were earmarked for increasing warehouse capacities and adding TCCC-branded 'coolers' at retail outlets:

In November 2014, Coca-Cola Amatil Limited ("Coca-Cola Amatil"), an equity method investee, and the Company

announced they had reached an agreement under which the Company would invest US\$500 million for a 29% interest in PT Coca-Cola Bottling Indonesia, a subsidiary of Coca-Cola Amatil... The investment was earmarked to boost capital expenditure in Indonesia, lifting production capacity, expanding warehouses and adding coolers at retail outlets. TCCC 2014 Fourth Quarter Report

Likewise, TCCC reported on the role that their food retail and distribution activities have contributed to sales growth in the region, including in the Philippines where sales volume growth was attributed to expansion in retail outlets:<sup>104</sup>

In the Philippines, through the replacement of more than 10 000 coolers and a 23-point increase in order fulfillment rates, we achieved double-digit volume growth for the year, along with our highest availability coverage and market share in 7 years. TCCC 2019 Fourth Quarter Report

TCCC control over downstream actors is not limited to financial investments. TCCC also described the benefits of partnership to their supply chains. For example, its partnership with the Philippines Department of Trade and Industry provided financing to sari-sari (convenience) stores, which are the primary distribution channel for TCCC's products.<sup>105</sup> Likewise, TCCC's partnership with Indonesian company, KarGo KarGo (a digitised highly complex business-to-business trucking logistics company) enabled improvements to distribution networks.<sup>106</sup>

#### Corporate political activities

In addition, the UPF industry lobbies to slow down or avoid government regulations, such as taxes and marketing restrictions, that may ultimately have a negative impact on the sales of their products.<sup>34 39–41 52 79</sup> Common corporate political activities include use of information and messaging to frame corporate arguments, constituency building to amplify pro-industry voices, legal opposition or threat of legal opposition to policies, policy substitution or proposing alternative policies that are favourable to industry, and offering financial incentives to policymakers.

Within the array of documents searched for this study, we found little reporting by TCCC on the firm's corporate political activities. However, we found multiple examples of corporate political activities by industry associations representing TCCC and other corporations. A total of 21 examples of corporate political activities conducted by TCCC and industry associations in East Asia LMICs since 2000 were identified (online supplemental appendix 2).

#### Constituency building

Analysis of industry associations' websites reveals the associations occurring between industry actors when it comes to corporate political activities. Both competing and non-competing firms have aligned under the banner of such industry associations, and this allows multiple different firms to align their opposition to policy and ensure that consistent arguments are brought to policymakers. For example, members of such industry associations would

commonly adopt the same guidelines relating to product labelling. Likewise, TCCC would often adopt similar messaging to such industry associations when arguing against a range of different food and nutrition policies. The highly concentrated nature of markets in East Asian LMICs, dominated by fewer large corporations, likely facilitates coordination.

TCCC and representing industry associations also act to form alliances with government members. For example, the Philippines Chamber of Food Manufacturers' website reports on an upwards of 30 meetings with government agencies between 2014 and 2021, and these agencies included the Food and Drugs Administration of the Philippines, the Food and Nutrition Research Institute and the National Nutrition Council.<sup>107</sup> Likewise, TCCC reports on its engagement with the Philippines president in response to the corporation's '5by20' PR exercises, with TCCC using such CSR initiatives as an opportunity to engage with government actors.<sup>108</sup>

TCCC also endeavours to recruit research actors to its side. TCCC reported instances where it had sent representatives to attend academic conferences in East Asian LMICs. Further to this, we also found evidence of instances where TCCC had directly contacted researchers in the region.<sup>109</sup> TCCC also engaged with the international sustainability consultancy firm Sancroft to commission policy briefs, describing the status of policy barriers in many East Asian LMICs.<sup>110</sup> Such research support was reported to allow TCCC to capitalise on political opportunities to increase profits.

### Information and messaging

We found multiple examples whereby TCCC and representing industry associations used framing and messaging techniques to oppose food and nutrition policy. For example, the Philippines Chamber of Food Manufacturers operationalised media platforms to voice their opposition to a tax on sugar-sweetened beverages. The Chamber 'strongly supported the exclusion of milk products' from the tax, as they argued this would harm low-income consumers.<sup>111</sup> TCCC itself took a similar stance when responding to a similar policy in Indonesia, arguing that such policies would damage the beverage industry.<sup>112</sup>

The tax "could be crippling for an industry that's just getting started," said Martin Gil, head of PT Coca-Cola Indonesia, Coca-Cola Co.'s subsidiary there, adding that the decision could be the beginning of a "slippery slope where anything that contains sugar" could be taxed. Indonesian Sugar-Tax Talk Chills Drinks Industry, *The Wall Street Journal*, 2015

Likewise, the American Chamber of Commerce in Viet Nam relied heavily on evidence supporting their opposition to a proposed tax on carbonated beverages. In a 2013 letter to the Director General of the Tax Policy Department, Ministry of Finance Viet Nam, the Chamber drew on evidence favouring their argument that 'carbonation may actually be beneficial in combating obesity',

by decreasing feelings of hunger, while making no statements regarding the calorie contents of these beverages.<sup>113</sup> The Chamber also referred to countries where similar taxation policies have been repealed.

Similarly, TCCC also takes the stance that increasing physical activity, rather than improving population diets, is key for reducing overweight and obesity. For example, TCCC is a proponent of supporting physical activity initiatives, such as the Coca-Cola Cup in the Philippines, arguing that such initiatives are indicative of the corporation's support for healthier lifestyles.<sup>114</sup>

[The Coca-Cola Cup] is an affirmation of our firm commitment as a Company to promote active, healthy lifestyles and support physical activity programs that inspire our youth to be healthier and happier. *Coca-Cola News Digest*, 25 November 2015

TCCC and representing industry associations also relied on messaging highlighting that education, rather than structural policies such as taxation, front-of-pack labelling and marketing restrictions, are required to address overweight and obesity. In a 2021 House of Representatives meeting, GAPMMI took the stance that 'the most important thing [for addressing overweight and obesity] is education about healthy living' rather than an 'excise tax [on sugar-sweetened beverages] that drives up selling prices'.<sup>115</sup>

### Legal strategies

The searched documents did not report on many examples wherein TCCC and representing industry associations had relied on legal opposition to food and nutrition policies. However, there was some evidence of threats of legal action being used to oppose policy. Such threats commonly drew on a country's WTO obligations. For example, the Philippines Chamber of Food Manufacturers made the claim that a proposed two-tier sugar-sweetened beverage tax (which charged a higher rate for imported beverages) was 'illegal'.<sup>116</sup> Likewise, the American Chamber of Commerce in Viet Nam made similar claims in response to a proposed carbonated beverages tax, arguing that that policy was 'designed to favor local branded beverages at the expense of foreign branded beverages', and that 'such a tax would be a clear violation of Viet Nam's WTO commitments and would send a message that Viet Nam has raised illegal barriers to foreign direct investment'.<sup>113</sup> Sourced documents also described trade disputes arguing against trade policy barriers preventing Coca-Cola imports into PNG.<sup>117</sup>

### Policy substitution

We identified several examples whereby TCCC and representing industry associations promoted alternative policies in East Asian LMICs. In some cases, we identified that this took the form of promotion of industry-led policy approaches, such as GAPMMI's amendment and promotion of the 'Indonesia Advertising Ethics'.<sup>118</sup> More broadly, Food Industry Asia

released 'Industry Guideline and Toolkit: Voluntary Front-of-Pack Nutrition Labelling for the Food & Beverage Industry in Asia', which takes the stance that food and nutrition labelling should be both voluntary and developed by industry.<sup>119</sup>

TCCC and representing industry associations also act to make alternative actions to recommended and best-practice policy approaches seem effective. We observed the promotion of existing, industry-led actions as examples by which TCCC proports that government-led approaches are unnecessary. For example, in their 2014 progress report,<sup>120</sup> the International Food & Beverage Alliance reported on the multitude of 'health-promoting' changes made by TCCC, notably in the Philippines, to ensure that globally recommended public health policies could be framed as unnecessary. Such 'health-promoting' initiatives included product reformulation to reduce calorie and sugar content, launching of low-calorie product lines and smaller portion sizes and launching voluntary and industry-led labelling guidelines.

#### Financial incentives

The searched documents did not report on any use of financial incentives by TCCC or representing industry associations to influence food and nutrition policy.

#### Marketing activities

To maximise the power and reach of its marketing campaigns, TCCC uses a variety of media, targets a range of settings and segments of the population and uses a range of different promotional techniques.<sup>71 72</sup> Understanding the marketing approach of TCCC is important, as the firm identifies marketing as necessary for increasing consumption and sales growth in East Asia LMICs<sup>121</sup>:

Early results from our turnaround in the Philippines are positive and are due in part to increased marketing investments and consumer marketing programs. TCCC 2007 Annual Report

A total of 42 unique marketing campaigns, conducted by TCCC in East Asia LMICs, were identified (online supplemental appendix 3). The majority (n=28) of these were in the Philippines and Viet Nam. This aligns with the sentiments expressed by TCCC in their 2010 annual report, where the corporation identifies the Philippines and Viet Nam as two key markets for current and future growth<sup>122</sup>:

The strong brand Coca-Cola growth came from a diversity of global markets, including double-digit growth in India, Viet Nam, the Philippines... TCCC 2010 First Quarter Report

#### Target markets

Across the region, over half (n=25) of all campaigns identified were specifically stated as targeting teens and/or young adults. TCCC reports that younger consumers are

not only the current driver of the success of the company, but also the key to future sales<sup>123</sup>:

Youth (12–29 years old) comprise 60% of non-alcoholic beverage drinkers in the Philippines. This is the segment where most of Coca-Cola's unstable consumption frequency is coming from, in favour of lower-priced competition. Winning them secures not just the current performance of the business, but also its future success. Marketing case study 'Coke: Happiest thank you', 2015

TCCC frequently adapted aspects of its marketing campaigns to target subsets of children and young adults. For example, TCCC reports on the #CokeKiss campaign in Viet Nam, which targeted young, on-the-go adults who might require a 'sugar hit' in response to energy slumps brought on by their busy lives.<sup>124</sup>

TCCC also often targeted their marketing to primary food shoppers (most often mothers). For example, TCCC identifies the Thadingyut Festival in Myanmar, which is associated with large meals and provision of gifts, as a market penetration opportunity to reach mothers.<sup>125</sup> As part of this festival TCCC provided mothers in Myanmar with gift packs, which were marketed as the perfect gift to give at this cultural reconnecting of families. Gift packs were promoted across television, print channels and on social media. This campaign saw significant increases in TCCC beverages sales, and in particular sales for 'at-home' consumption. In relation to this campaign, TCCC states that:

Mums are at the heart of life in Myanmar. They make all shopping and purchase decisions and have a strong influence on the family life, even more than in other APAC countries. They are tasked with buying the perfect gifts and preparing the best feast. Marketing case study 'Coca-Cola: Thadingyut Festival Myanmar', 2017

TCCC also reports that promoting its products to be consumed with food resulted in significant returns on investment. For example, TCCC described how its 'Goes well with Food' campaign, centred around by 52 weeks of non-TV advertising to promote consumption of TCCC beverages with food, resulted in growth in beverage sales, overall brand growth and significant social media engagement<sup>126</sup>:

As a result of the campaign, Coca-Cola increased the number of drinks sold per week by 17%, contributing to brand growth of 11%, and the campaign garnered high engagement among users, with YouTube and Facebook view-through rates that were, respectively, 30% and 60% higher than the norm. Marketing case study 'Coca-Cola: 52-week non-TV engagement to build 'Coca-Cola with food' habit', 2020

TCCC also markets through diversifying product lines to both attract a greater range of consumers and protect against barriers to, or reductions in, sales of other product lines. For example, in Viet Nam, TCCC company launched Fuzetea+ to target health-conscious consumers and to enter a rapidly growing market.<sup>127</sup> Also in Viet Nam was the launch of Coke Plus Coffee, combining

Coca-Cola with coffee to tap into regional purchasing trends.<sup>128</sup>

### Marketing media

TCCC marketing case studies also describe how, as the access to online platforms and media has grown and expanded worldwide, TCCC has made digital marketing a key component of its expansion to East Asian LMICs. TCCC reports that mobile phone ownership in these LMICs is often greater than television ownership, and as such TCCC is relying less on out-of-home and television advertising and more on digital advertising as its primary marketing medium. Indeed, 23 of the 41 marketing campaigns identified used either mobile or social media and online advertising as their primary means of marketing. For example<sup>129</sup>:

In Indonesia, major brands such as Coca-Cola... are increasingly turning away from TV and looking to Facebook first when planning campaigns. Marketing case study 'Brands turn to Facebook in Indonesia', 2015

A specific example of digital marketing campaigns run by TCCC in the region is the 'President for Happiness' campaign in the Philippines. The 'President for Happiness' was a Filipino citizen who 'inspired joy and let it spread, amongst Filipinos online' by broadcasting positive messages over social media in front of a backdrop full of TCCC product placement and advertising.<sup>130</sup> This campaign reportedly resulted in 'brand love' increasing by 12.2%, and a 7.6% growth in TCCC sales.

TCCC also implies that, as mobile phones have become more prevalent in East Asian LMICs, the beverage conglomerate has adopted this technology as a platform for marketing. TCCC reports that mobile phone ownership in Cambodia is over 95%, providing an avenue for marketing when other media might be less accessible. TCCC deployed time-targeted virtual calls, where young celebrities would encourage consumers to drink a TCCC product. The call was accepted by 71% of the targeted individuals, and 11% of targeted individuals followed-up by visiting the product webpage.<sup>131</sup>

Unwilling to accept limitations of an emerging market, Coca Cola was keen to test the mobile waters in Cambodia. So we created Cambodia's first mobile campaign to help Coke meet its branding and marketing goals. Marketing case study 'Coca-Cola: Coke Break', 2017

### Marketing techniques

TCCC marketing case studies describe the varied range of marketing techniques used by TCCC across East Asian LMICs. Many of these are tailored to specific cultural contexts. For example, TCCC identifies the Philippines as an emotive country where 'happiness' is a valued concept. As a result, all identified marketing campaigns that relied on emotional levers were conducted in the Philippines. For example, TCCC describes how the 'Happiest Thank You' campaign in the Philippines capitalised on feelings of gratefulness to encourage individuals to 'thank' their

friends and colleagues by gifting personalised cans.<sup>132</sup> With a budget of less than US\$500 000, the campaign increased the number of weekly consumers of TCCC products by 1.5%-points.

As the most emotional people in the world, we knew we needed to bring out a powerful emotional truth that makes saying 'thank you' through a personalized Coca-Cola bottle mean so much more. Marketing case study 'Coca-Cola: Happiest thank you', 2015

TCCC also identifies cultural and religious events as opportunities to promote its products. For example, in Indonesia, TCCC frequently reports on its use of Ramadan to market its beverages to the Muslim population.<sup>133</sup> TCCC reports that its Ramadan-associated campaigns have resulted in a 2% increase in market share over three annual campaigns.

Sprite needed to boost its sales in Ramadan, where product relevance is decreasing, and alternative drinking products are desired. In fasting season, while other brands in Indonesia used religious imagery to communicate, Sprite wanted to be truthful to what consumers really experience during Ramadan: hunger and thirst. Marketing case study 'The Coca-Cola Company Indonesia: Sprite Ramadan: A Truth in The Truthful Month', 2017

TCCC reports on the numerous times that it has marketed through sporting events and through use of sponsorship throughout the region. For example, TCCC reports the launch of campaigns associated with the FIFA World Cup in Myanmar and Viet Nam. TCCC describes its sponsorship of the FIFA World Cup Trophy Tour in Myanmar and Viet Nam, also reporting on its development of custom FIFA World Cup cans in Viet Nam.<sup>134</sup>

The World Cup was one of the most important occasions for Coca-Cola to drive brand love among Viet Nameese teens and youths. The strategy was to create excitement among the target audience with special cans designed for eight different countries taking part in the World Cup as a way of extending support for 'your second country'. Marketing case study 'Coca-Cola: World Cup Food Combos', 2018

TCCC describes how marketing alongside the FIFA World Cup in Myanmar resulted in over 10 million media impressions and in TCCC becoming the leading food and beverage Facebook page in the country.<sup>135</sup> In Viet Nam, TCCC also reports that TCCC's World Cup campaign was the highest rated social media campaign.

### Public relations activities

TCCC engages in a number of PR activities in East Asia LMICs, ostensibly to support consumers, employees, the community, the environment, the economy and/or human rights.<sup>58 59</sup> A total of 36 unique PR activities were identified from annual reports and other documentary sources (online supplemental appendix 4). The majority of the identified PR activities were conducted or reported since 2015 (n=21), and in the Philippines (n=15), followed by Viet Nam (n=12), noting that some

individual PR activities were conducted in multiple countries across the region.

#### PR activities relating to the community

TCCC's reporting of its responsibility and commitment to the community in East Asian LMICs broadly centres on programmes to support education and training, and programmes to support small businesses. As an example of the former, TCCC described how it has funded over 100 'Little Red Schoolhouses' (elementary schools, with a picture showing that these are painted in TCCC brand colours of red and white) in the Philippines.<sup>136</sup> TCCC also reports on its programmes to support small businesses in East Asian LMICs. For example, TCCC details its offering of US\$3.2 million in low-interest loans to 15 000 Filipino sari-sari (convenience) store owners to assist with their safe reopening in the wake of the COVID-19 pandemic.<sup>137</sup> TCCC identifies these stores as one of the primary retail outlets through which TCCC products are sold.

Coca-Cola Philippines partnered with government agencies and two leading micro-finance institutions to create the Rebuilding Sari-Sari Stores Through Access to Resources and Trade (ReSTART) initiative. The program allocated approximately US\$3.2 million in loan packages to some 15 000 micro-retailers so they could reopen safely. Coca-Cola 2020 Annual Report

#### PR activities relating to the economy

TCCC's reporting of its responsibility and commitment to the economy of East Asian LMICs is primarily through its descriptions of the jobs created by TCCC's presence. TCCC claimed in 2009 that its three bottling operations in Viet Nam were responsible for the employment of 1500 individuals directly, but indirectly contributed to more than 15 000 jobs across multiple industries.<sup>138</sup>

#### PR activities relating to human rights

TCCC's reporting of its responsibility and commitment to human rights in East Asian LMICs includes support for disaster response, provision of drinking water and gender equity activities. For example, TCCC details its allocation of US\$3 million and US\$300 000 to COVID-19 relief efforts in the Philippines<sup>139</sup> and Viet Nam,<sup>140</sup> respectively, alongside temporarily pausing advertising in both countries. Following these activities, TCCC launched a marketing campaign in Viet Nam to share what they had done with the public.

#### PR activities relating to the environment

TCCC's reporting of its responsibility and commitment to the environment in East Asian LMICs covers multiple facets of environmental protection. TCCC annual reports describe TCCC's contributions to a number of clean-up programmes in the region, including a US\$11 million investment in river clean-up programmes across nine countries, including Indonesia and Viet Nam, in 2019.<sup>141</sup>

Recycling activities are also reported by the company, including the creation of a US\$19 million bottle-to-bottle recycling facility in the Philippines, the first in the region, in 2018<sup>142</sup>:

Coca-Cola Beverages Philippines, the bottling arm of Coca-Cola in the Philippines, announced that it will lead the investment in a US\$19 million state-of-the-art, food-grade recycling facility that will collect, sort, clean and wash post-consumer recyclable plastic bottles and turn them into new bottles using advanced technology. TCCC 2018 Annual Report

TCCC's environmental protection activities often integrate with explicit marketing activities. For example, in the Philippines, TCCC ostensibly wanted to promote environmental protection and describes its launch of the 'Living Billboard'—a TCCC branded billboard which was covered with living plants.<sup>143</sup> The reported aim of this activity was to commence conversations regarding pollution, however, return on investment is described in terms of media exposure:

In response, the company implemented "The Living Plant Billboard" which was a billboard in one of the country's most polluted thoroughfares covered in thousands of Fukien tea plants. The billboard generated more than US\$475 000 worth of free media in 3 months. Marketing case study 'Coca-Cola: Living plant billboard', 2012

Not all TCCC's PR activities have been successful. For example, it was reported in 2015 that TCCC's launch of an environmentally sustainable water awareness initiative (EKOCENTER) in Viet Nam was tarnished by media reports of the company's failure to comply with environmental protection laws.<sup>144</sup>

## DISCUSSION

TCCC's market and non-market activities in East Asia LMICs present a risk to health and may undermine health promotion efforts.<sup>38 39 77 145</sup> Market activities conducted by TCCC include (1) supply-chain activities to grow its reach and supply chains, (2) marketing of products and brands, particularly on digital and mobile platforms to children, adolescents and mothers, through campaigns that, in their own estimation, grow market share, improve public perceptions and provide a positive return on investments, and (3) public relations activities related to human rights, environmental sustainability and community and economic supports, as both a marketing tool, and to position the company in a favourable light to the media, shareholders, government and the general public, while ignoring other issues related to TCCC's corporate activities. TCCC's non-market activities include association with regional industry associations, who present industry-favouring evidence, threaten legal action and engage with policymakers to amplify industry voices.

TCCC's corporate activities are closely related to the corporate power that the firm holds.<sup>38 77 145</sup> Corporate

power infers on corporations the ability to influence markets, public policy, public perceptions and multiple other facets of society.<sup>38 77 145</sup> There are multiple origins of corporate power, and one way of conceptualising these is as material and ideational sources.<sup>77</sup> Material sources of corporate power include the physical resources owned by a firm, including financial resources and means of production. Here, we have shown that TCCC is growing its material corporate power by purchasing competing businesses and production facilities, partnering with other corporations to boost supply chains, supporting key distribution networks through PR investments and using numerous strategies to protect and increase market share. Ideational sources of corporate power are the social constructs, such as norms, values, ideas and knowledge, that increase a firm's influence (eg, public perceptions of, or government influence over, a corporation).<sup>77</sup> Our findings show how TCCC is building its ideational corporate power across LMICs in East Asia by marketing its products, engaging in PR to shift public perceptions and whitewash its reputation, and corporate political activities to minimise barriers to the sale of its products.

TCCC's corporate power supports the firm's ability to create wealth for its shareholders and control resources, and this has in turn supported TCCC's ability to sell its harmful products.<sup>146</sup> In contrast, the proportion of TCCC's income that is redistributed to the public through income taxes has decreased. This is increasingly the case in LMICs as well.<sup>146</sup> Subsequently, TCCC's operationalisation of its corporate activities and accompanying increases in corporate power can be said to be directly influencing aspects of the nutrition transition occurring in many LMICs.

### Comparisons with literature

Previous research has also described the expansion of UPF supply chains into Asia. Among East Asian LMICs, the removal of restrictions on foreign direct investment in Viet Nam has been associated with increased supply chain investments by multinational beverage corporations, which has in turn led to a quadrupling of beverage sales in this country.<sup>147</sup> Similar activities aimed at expanding supply chains have been observed in other Asian nations. For example, TCCC successfully re-entered China and India after liberalisation of these economies. The introduction of TCCC's supply chains in these countries was accompanied by reduced soft drink prices (relative to pre-liberalisation market prices) and increased consumption.<sup>45</sup>

The corporate political activities conducted by TCCC and other transnational UPF corporations in East Asian LMICs has been relatively under-researched. However, food and beverage industry attempts to influence policy development have been documented in Thailand<sup>53</sup> and India and China (which are not LMICs).<sup>45</sup> In Thailand, industry particularly relied on informational and constituency building tactics as their key political activities, aligning with what we report herein.<sup>53</sup> However,

'behind the scenes' activities, such as financial incentives offered to policymakers and opposition destabilisation were not reported in the documents analysed here, and this aligns with what has been reported elsewhere.<sup>53-57</sup> Industry opposition to policies in the Philippines has been described anecdotally.<sup>148 149</sup> It is likely that alternative data sources, such as qualitative interviews, need to be explored to fully understand the extent of UPF and beverage corporate political activities in East Asian LMICs.

We describe how TCCC's marketing campaigns in East Asian LMICs target children, adolescents and young adults. These findings align with studies in Manila (the Philippines) and Ulaanbaatar (Mongolia) where unhealthy food advertising was shown to be highly prevalent near schools.<sup>150</sup> Similarly, in Indonesia, unhealthy food and beverage advertisements were more prevalent in locations that children commonly frequent compared with areas not frequented by children.<sup>151</sup> Also in Indonesia, children have been found to be frequently exposed to unhealthy food and beverage marketing on television, more so than the higher income countries of China, Malaysia and South Korea.<sup>63</sup> We also report on the increased use of online and digital marketing by TCCC, and the frequent use of digital marketing by the UPF industry in the Philippines has been reported.<sup>152 153</sup>

Our study adds to knowledge on the marketing of UPFs in the region by describing the explicit objectives of TCCC's marketing campaigns to target children, young adults and families. This is despite TCCC's, and broader the UPF industry's, pledges to protect children from the harmful impacts of unhealthy food and beverage marketing, such as the Philippine Responsible Advertising to Children Pledge.<sup>154</sup> While many of TCCC's identified marketing campaigns are not in violation of these pledges, which commonly only apply to children under the age of 12 years, they highlight how explicit TCCC is at targeting the gatekeepers of young children's diets (mothers), and older children. These findings are concerning because of the demonstrated influence of unhealthy food and beverage marketing over children's food and beverage preferences for and consumption of unhealthy products, with unhealthy food and beverage marketing shown to increase children's requests for advertised products and undermine caregivers' intentions to provide healthier foods and beverages.<sup>47 155-157</sup> Our findings support evidence showing industry-led codes are ineffective at reducing children's exposure to unhealthy food and beverage marketing.<sup>158-161</sup> Our results reinforce global recommendations from the WHO and other bodies to move away from a 'child-directed' approach to marketing restrictions, and towards actions that target all marketing that children are exposed to, or which has the intention of influencing children's UPF consumption.<sup>157</sup>

An interesting insight from this analysis was the use of PR by TCCC. We report on the multiple ways in which TCCC operationalises its PR activities to seemingly support human rights, environmental sustainability and

community programmes, while continuing to expand sales of products harmful to human and environmental health. This included launching of 'Little Red Schoolhouses', ostensibly to support education, funding of small and local community businesses, clean-up and anti-pollution initiatives and supporting disaster responses. Our results support an earlier study in Viet Nam where it has been described that the UPF industry engages with PR activities related to labour rights, environmental protection and philanthropy.<sup>162 163</sup> PR activities are used by food and beverage corporations for a range of reasons. First, to support supply chain activities by identifying strategic and operational opportunities.<sup>164 165</sup> Second, to drive consumer awareness of the corporation and its products, acting as complimentary marketing activities.<sup>166</sup> Third, to draw attention to activities and regulatory actions that are unlikely to harm profits, such as physical activity and nutrition education initiatives, and to fix reputations that are likely to have been tarnished by the unhealthy products sold by these corporations.<sup>166 167</sup>

Nguyen *et al* found that the UPF industry used PR activities to improve consumer perspectives of these unhealthy corporations.<sup>163</sup> In Indonesia, PR activities by the UPF industry were found to increase corporations' market capitalisation relative to companies that did not disclose such PR activities.<sup>168</sup> There are inconsistencies in TCCC's PR activities. TCCC purports to be a creator of jobs and employment in East Asian LMICs. However, research shows that TCCC's profits and distributions to shareholders have increased significantly over time, with little improvements seen in workers' incomes or conditions.<sup>146</sup> While TCCC's funding of Sari-Sari stores in the Philippines in the wake of the COVID-19 pandemic may be marketed as altruistic, these stores represent a key distribution network for TCCC beverages, and it is reasonable to expect that Coke's support for these stores is likely to result in additional profits. Likewise, TCCC promotes its environmental activities, in this region and elsewhere, as evidence of its social responsibility. However, these activities seem ironic as the company is recognised as one of the largest contributors to plastic pollution globally.<sup>169</sup> TCCC also touts its support of children through the provision of a range of education and support services. Such PR activities seem in stark contrast to TCCC's marketing activities in the Philippines, which we show explicitly targets children as a key demographic segment of the market. Indeed, TCCC-funded 'Little Red Schoolhouses' in the Philippines are often painted red and white (colours of TCCC brand), with branded marketing collateral.<sup>148</sup>

### Implications

It is imperative that governments in East Asian LMICs look for policy options to reduce the power and influence of UPF corporations. Food policy literature points to a number of strategies that may help governments maintain power. One avenue is to directly limit corporations' abilities to consolidate corporate power through

restrictions on certain corporate activities. For example, unhealthy food and beverage marketing restrictions are likely to decrease consumer demand for unhealthy products, especially in disadvantaged and at risk population groups.<sup>38</sup> We have previously shown that policy responses to unhealthy food and beverage marketing in East Asian LMICs are limited to non-existent.<sup>20</sup> Policies might also seek to enforce better corporate reporting standards for activities related to a broad definition of sustainability.<sup>170 171</sup> This would increase rigour in the way PR activities are reported on and reduce corporate use of sustainability reporting principally as a marketing tool. Governments may also look to competition-based policies, to prevent unfair trading practices by reducing the dominance of larger corporations.<sup>38 172 173</sup> In a similar fashion, both upstream suppliers and downstream distributors can be supported through government policies to better combat the predatory practices of large UPF firms.<sup>38 172</sup>

Governments in LMICs may need support to implement policies to reduce the negative influence of corporate market and non-market activities, and in identifying and managing conflicts of interest and corporate influence.<sup>174</sup> Transnational UPF corporations are likely to act to influence or prevent the implementation of any policies that may impact their profits and power.<sup>34 52 79</sup> This highlights the importance of adhering to conflict-of-interest guidelines when developing food and nutrition policies.<sup>175</sup> Policymakers in Asia have previously highlighted the role that research can play in supporting such LMICs to resist corporate influences and ensure that implemented policies are from conflicts of interest.<sup>174</sup>

### Strengths and limitations

A strength of this research is that it draws on multiple documentary data sources to describe a broad range of TCCC's activities in East Asian LMICs, ensuring that coverage of TCCC's activities is likely to be comprehensive. Further, we describe the commercial determinants of unhealthy diets in a region that has previously been understudied, opening the door to future research to drive political will and support policy implementation for addressing corporate influences. Finally, we expand on the Kickbusch commercial determinants of health framework<sup>39</sup> to incorporate additional frameworks relating to supply chains,<sup>78</sup> marketing<sup>71 72</sup> and PR.<sup>58 59</sup> Including these multiple different frameworks allows a more in-depth conceptualisation of each of these corporate activities than might otherwise have been allowed by relying on the more simplistic Kickbusch framework<sup>39</sup> alone.

This research has a number of limitations. First, we chose to focus on a single UPB corporation, TCCC. It is possible that the actions of TCCC do not represent the activities of other UPF corporations in LMICs in the East Asia Pacific region. Further, there is a risk that by focusing on a single corporation we may incorrectly single-out TCCC as the corporation that most prolifically engages in these activities, which was not the intention of this

approach, nor do we collect sufficient data to compare corporations in this way. Instead, evidence suggests that UPF corporations conduct similar activities, and it is logical to focus such research on the UPF industry's most dominant corporation.<sup>148</sup> Second, we refine the scope of this research and include a select range of industry documents in this analysis, and it is possible that some documentary data sources may have been missed and subsequently that not all corporate activities have been captured. In particular, as WARC focuses on select marketing case-studies, the description of marketing activities within LMIC's in East Asia may not be representative of all countries and campaigns.<sup>85</sup> Future research may wish to be guided by a formalised monitoring framework, such as INFORMAS,<sup>176</sup> while focusing on a single corporate activity. Third, our theoretical framework was only informed by existing literature on supply chains, corporate political activities, marketing and PR. As such, some corporate activities, such as those relating to upstream suppliers,<sup>38</sup> were deemed to be outside the scope of this study. Future research should look to examine other corporate activities, such as more in-depth analysis of interactions with competing, upstream and downstream firms, both for TCCC as well as other UPF corporations. Fourth, many aspects of corporate political activities are conducted informally (including in Asia<sup>53</sup>) and are unlikely to be detected by the desk-top methods used in this study. Future research could include interview data as an approach to assess corporate political activities, however this was beyond the scope of the current study.<sup>45</sup> Finally, we only captured social media and digital marketing by TCCC to the extent that it was included in the WARC database. As digital marketing by the UPF industry is increasingly prevalent in LMICs,<sup>152 153</sup> future research should explore other monitoring avenues for capturing this increasingly prolific and harmful marketing avenue.

## CONCLUSIONS

We have described the multiple supply chain, political, marketing and PR activities used by TCCC to drive sales of its products. Our analysis revealed a clear strategy for growth and expansion in East Asian LMICs that presents a risk to health and may undermine health promotion efforts. We have outlined a suite of policy options governments could pursue to address the growing influence of transnational UPF corporations to improve population diets and health.

**Twitter** Oliver Huse @Oliver\_Huse, Erica Reeve @erica\_reeve, Colin Bell @AColinBell, Gary Sacks @gary\_sacks, Phillip Baker @philbakernz, Benjamin Wood @BenjaminM\_Wood and Kathryn Backholer @KBackholer

**Contributors** OH designed the research question, conducted data collection and analysis and drafted and revised the manuscript. He is a guarantor. ER provided feedback on the research question, conducted data analysis and revised the manuscript. CB, GS, PB and BW provided feedback on the research question and revised the manuscript. KB designed the research question and revised the manuscript.

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