

## Food systems transformations, ultra-processed food markets and the nutrition transition in Asia

A nutritional transition is occurring in Asia, whereby there has been a rapid increase in the consumption of ultra-processed foods (UPF), particularly in middle-income countries. Transnational food and beverage corporations (TFBCs) are targeting Asian markets - due to their high economic growth rates, young and growing populations, and increasingly open markets. Evidence indicates that these corporations can use their market power to significantly shape both local and global food systems with substantial impact – altering the availability, price, nutritional quality, desirability and ultimately consumption of such foods. This paper aims to elucidate the recent changes in Asian food systems driven by TFBCs in the retail, manufacturing and food service sectors, and also aims to understand the consequences this has for population health and nutrition through the changes in ultra-processed food sales.

The paper analyses market data from Asian countries of a range of income levels to determine trends in UPF consumption, packaged food retail distribution channels, 'market transnationalization', and 'market concentration'. Findings of the study include the fact that sales of UPF have increased rapidly in most middle-income Asian countries in recent years. The results also showed that some TFBCs dominate the market of certain products and are extremely influential in the sale of UPF. Findings also include the fact that supermarkets, hypermarkets and convenience stores are becoming progressively influential in the sale of packaged food products in Asia. Additionally, 'market concentration' was found to be increasing across all countries investigated in the grocery retail sector.

Overall, results indicate that market power is a significant driver of the nutrition transition occurring in Asia, and is an influential factor in the alteration of food systems and increasing sales of UPF products.

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