

## Glossary

Term	Description
<b>Absolute gross margins</b>	The difference between revenue and cost of goods sold.
<b>Anti-reflux formula</b>	Is also called staydown formula and is suitable from birth but only under medical supervision. This type of formula is thickened with the aim of preventing reflux in babies (when babies bring up milk during or after a feed). <sup>1</sup>
<b>ASA</b>	Advertising Standards Authority.
<b>Baby</b>	Means a child under the age of 12 months.
<b>Baby clubs</b>	Refers to information, advice and support that parents can access and is provided by manufacturers on a wide range of topics, from pre-birth matters such as conception, through to pregnancy and birth, as well as baby care and parenthood, health, wellbeing and fitness, nutrition and relationships. They also include information about a brand and the specific products available within the brand range.
<b>BCAP Code</b>	The UK Code of Broadcast Advertising. This applies to all advertisements (including teleshopping, content on self-promotional channels, tv text and interactive tv ads) and programme sponsorship credits on radio and tv services licenced by Ofcom. <sup>2</sup>
<b>BRC</b>	British Retail Consortium
<b>Breastfeeding</b>	Refers to the feeding of an infant with milk taken from the breasts, either directly by the infant or expressed and given to the infant via a bottle or other drinking vessel. <sup>3</sup>
<b>British Specialist Nutrition Association (BSNA)</b>	A trade association which describes itself as 'representing manufacturers of high-quality specialist nutritional and aseptically compounded products' <sup>4</sup> .

<sup>1</sup> NHS, [Types of formula milk - NHS \(www.nhs.uk\)](https://www.nhs.uk), accessed 30/09/24.

<sup>2</sup> Advertising Standards Authority, [Advertising codes](#), accessed 15/10/24.

<sup>3</sup> Scientific Advisory Committee on Nutrition, 2018, Feeding in the first year of life, p233.

<sup>4</sup> British Specialist Nutrition Association, [About BSNA](#), accessed 27/01/25.

Term	Description
<b>CAP Code</b>	<p>The UK Code of Non-broadcast Advertising and Direct &amp; Promotional Marketing. This is the 'rule book' for non-broadcast advertisements, sales promotions and direct marketing communications.<sup>5</sup></p> <p>The CAP Code covers many different types of advertising in social media, from the more traditional 'paid-for' ads to advertorials and affiliate marketing, and also - since 2011 - some of the content on a company's own social media channels. The CAP Code necessarily excludes material in 'foreign media'.<sup>6</sup></p>
<b>Comfort formula</b>	Is suitable from birth following advice from a midwife or health visitor. This type of formula contains cows' milk proteins that have already been partly broken down (partially hydrolysed). <sup>7</sup>
<b>Complementary feeding</b>	Refers to the period when solid foods are given in addition to either breastmilk or infant formula to complement the nutrients provided by breastmilk and/or infant formula when breastmilk and/or infant formula alone is not sufficient to meet the nutritional requirements of a growing infant. Complementary feeding includes all liquids, semi-solid and solid foods, other than breastmilk and infant formula. <sup>8</sup> Complementary feeding generally starts at age 6 months.
<b>CPI</b>	Cost Price Increase.
<b>DHA – docosahexaenoic acid</b>	Is a fatty acid. Regulation 2016/127 specifies the mandatory addition (within a range) of DHA in infant formula and follow-on formula. <sup>9</sup>
<b>DHSC</b>	Department for Health and Social Care.
<b>Discounters</b>	Are typically the cheapest retailers. In this market study, 'discounters' refers to the three largest discounters, Aldi, Iceland and Lidl.
<b>Follow-on formula (FOF)</b>	Is suitable for infants from 6 months, although the NHS advises asking a health visitor for advice first. It typically given the number 2 on packaging. Follow-on formula should never be fed to babies under 6 months old. <sup>10</sup>

<sup>5</sup> Advertising Standards Authority, [Advertising codes](#), accessed 15/10/24

<sup>6</sup> Advertising Standards Authority, [Remit: Social media](#), accessed 23/01/25.

<sup>7</sup> NHS, [Types of formula milk - NHS \(www.nhs.uk\)](#), accessed 30/09/24.

<sup>8</sup> Scientific Advisory Committee on Nutrition, 2018, Feeding in the first year of life, page 234. Scientific Advisory Committee on Nutrition, 2018, Feeding in the first year of life, pg 234, Department of Health and Social Care (updated April 2024), [Guidance on Commission Delegated Regulation \(EU\) 2016/127](#), accessed 14/10/24

<sup>9</sup> [Regulation \(EU\) 2016/127](#).

<sup>10</sup> NHS, [Types of formula milk - NHS \(www.nhs.uk\)](#), accessed 30/09/24.

<b>Term</b>	<b>Description</b>
<b>Food for special medical purposes (FSMP)</b>	Has been specially processed or formulated and is intended for the dietary management of patients, including infants, to be used under medical supervision; it is intended for the exclusive or partial feeding of patients with a limited, impaired or disturbed capacity to take, digest, absorb, metabolise or excrete ordinary food or certain nutrients contained therein, or metabolites, or with other medically-determined nutrient requirements, whose dietary management cannot be achieved by modification of the normal diet alone'. <sup>11</sup>
<b>Formula milks</b>	Refers to all of infant formula, follow-on formula, growing-up milk, and infant food for special medical purposes.
<b>FSA</b>	Food Standards Agency.
<b>FSG Regulation</b>	Food for Specific Groups Regulation (EU) No 609/2013 (FSG Regulation) (assimilated direct legislation).
<b>FSNT</b>	First Steps Nutrition Trust.
<b>Growing-up milk (GUM)</b>	Is also called toddler milk and typically given the numbers 3 and 4 on the packaging. It is suitable from 1 year, although the NHS advises asking a health visitor for advice first. <sup>12</sup>
<b>Halo effect</b>	Marketing and promotional activities for one product which support sales of another product.
<b>HCPs</b>	Healthcare professionals.
<b>HiPP UK Limited (HiPP)</b>	Manufacturer of HiPP Organic formula milks.
<b>Hungry baby formula</b>	Is also called hungry milk and is suitable from birth, although the NHS recommends asking a midwife or health visitor for advice first. This type of formula contains more casein than whey, and casein is harder for babies to digest. <sup>13</sup>
<b>IBFAN</b>	Baby Milk Action, member of the International Baby Food Action Network.
<b>Infant formula (IF)</b>	Is also called first infant formula/milk and typically given the number 1 on the packaging. It describes a food intended for use by babies during the first months of life and satisfying by itself the nutritional requirements of such infants until the introduction of appropriate complementary feeding. <sup>14</sup>

<sup>11</sup> [Food for Specific Groups Regulation \(EU\) No 609/2013](#) (assimilated direct legislation), Article 2.

<sup>12</sup> NHS, [Types of formula milk - NHS \(www.nhs.uk\)](#), accessed 30/09/24.

<sup>13</sup> NHS, [Types of formula milk - NHS \(www.nhs.uk\)](#), accessed 30/09/24.

<sup>14</sup> Guidance Commission Delegated Regulation (EU) 2016/127 (supplementing Regulation (EU) No 609/2013): guidance, updated 3 April 2024, accessed 30/09/24.

<b>Term</b>	<b>Description</b>
<b>Kendal Nutricare Limited ('Kendal')</b>	Manufacturer of Kendamil and Bonya formula milks.
<b>Manufacturers</b>	This market study has considered the supply of infant formula and follow-on formula in the UK. Several suppliers of infant formula and follow-on formula that we refer to in this final report are part of corporate groups. Some of their business activities and operations are performed outside of the UK. Our focus has been on operations, sales, production, decisions, transactions and/or other activities that are relevant to the UK market, irrespective of where these activities are performed.
<b>MIR</b>	Market Investigation Reference.
<b>Nestle UK Limited ('Nestle')</b>	Manufacturer of SMA (SMA and SMA Advanced) and Little Steps formula milks.
<b>NICE</b>	The National Institute for Health and Care Excellence.
<b>NLCS Framework</b>	A framework which sets out arrangements for co-operation between DHSC, the Scottish Government, the Welsh Government and the Food Standards Agency in Northern Ireland in relation to nutrition related labelling, composition, and standards policy.
<b>Nutricia Limited trading as Danone UK ('Danone')</b>	Manufacturer of Aptamil (Aptamil and Aptamil Advanced) and Cow & Gate formula milks.
<b>Our consumer research</b>	This was commissioned by the CMA and awarded to the independent research company, Thinks Insight and Strategy.
<b>Own-label</b>	Refers to a product which is produced exclusively for and stocked by a particular retailer. It is therefore not available for purchase elsewhere.
<b>Parents</b>	Encompasses all family structure types and caring roles.
<b>Product range</b>	Refers to the set of products within a brand or sub-brand. Typically, brands and sub-brands consist of several formula milk products which are suitable for babies and children of different ages.
<b>R&amp;D</b>	Research and development.
<b>Ready-to-feed (RTF) formula</b>	These are pre-made, sealed bottles of liquid formula milk, in contrast to tubs/ tins of powdered formula.
<b>RFI</b>	Request For Information.

<b>Term</b>	<b>Description</b>
<b>RRP</b>	Recommended Retail Price.
<b>SIFAN</b>	Scottish Infant Feeding Advisor Network
<b>SKUs</b>	Stock Keeping Units.
<b>Special milks</b>	Refers to anti-reflux, comfort, and hungry baby formula products.
<b>Starter pack</b>	Refers to packs of infant formula which are designed for convenience, for example in the first few days of a baby's life in hospital, and generally include 6 x 70ml ready to feed bottles and pre-sterilised teats. Bottles and teats may also be single use/disposable. <sup>15</sup>
<b>Toddler</b>	Means a child aged between one and three years.
<b>USP</b>	Unique selling point.
<b>UK</b>	United Kingdom
<b>WBTi</b>	World Breastfeeding Trends Initiative UK (WBTi) UK Steering Team
<b>WHO</b>	World Health Organization.
<b>WHO Code</b>	WHO International Code of Marketing of Breastmilk Substitutes. This, along with subsequent resolutions, is an international health policy framework designed to encourage better regulation of the marketing of breastmilk substitutes in order to protect and promote breastfeeding.
<b>WIFN</b>	Wales Infant Feeding Network.

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<sup>15</sup> Manchester University NHS Foundation Trust, [What should I pack for coming into hospital?](#), accessed 15/10/24.