

## Summary of FDF's response to the DHSC consultation on applying the 2018 NPM to advertising and promotions restrictions

### Introduction

The Food and Drink Federation (FDF) represents the UK food and drink manufacturing industry, the largest manufacturing sector in the country. We welcome the ambition of government's 10 Year Health Plan for England and plans to bring forward '*smarter regulation, focused on outcomes*'. In particular, we support the commitment to introduce mandatory reporting of healthier food sales across retail, manufacturing and hospitality. Through this, they have an opportunity to continue to incentivise companies to make healthier products, while creating consistent data to inform current and future policymaking.

However, we have major concerns about changing the Nutrient Profiling Model (NPM) which is used to underpin the advertising and promotion regulations for less healthy food (HFSS). With the HFSS Regulations only recently coming into force – including the advertising regulations which were implemented in January 2026 – this change is moving the goalposts prematurely. It will have a number of unintended consequences and will send a confusing message for consumers and businesses alike.

Instead, we urge government to undertake an evaluation of the existing policies and their effectiveness, before considering any changes to the NPM.

### Industry progress supporting healthier diets

Food and drink manufacturers are committed to helping people follow healthier diets. Our members have invested hundreds of millions of pounds over the past two decades in developing healthier options. This includes adapting recipes of familiar products, launching new healthier options, and adjusting portion sizes.

Our sector has stepped up to deliver healthier options to support government's ambitious High Fat, Sugar and Salt (HFSS) regulations, and we've made clear, demonstrable progress. In the last five years alone, our members have reduced the calories (17%), salt (18%) and sugar (19%) in their products by nearly a fifth<sup>i</sup> and improved the average NPM score by 13%<sup>ii</sup>. Meanwhile, with most people not getting enough fibre in their diet, our proactive industry initiative, Action on Fibre, has delivered two billion servings of fibre since 2021<sup>iii</sup>. Our [Shaping a Healthier Future report](#) showcases this progress.

Whilst it's early days for the HFSS Regulations, initial evidence suggests that they are having an effect on consumer purchasing. Evidence from Leeds University has found that HFSS retail sales fell by 2 million per day from 2021 to 2023<sup>iv</sup>. The Office of Health Improvement and Disparities report on food purchasing behaviour has also seen a reduction in HFSS retail sales during this period, and the products purchased contained fewer free sugars<sup>v</sup>. We're making positive progress and industry wants to work with government to ensure that this continues.

### Unintended consequences of the 2018 NPM

We believe that government's plans to change the NPM within HFSS regulations will have a significant negative impact on both consumers and businesses.

- **The evidence used to predict the obesity impact is too uncertain:** The DHSC impact assessment acknowledges that there's limited evidence underpinning their modelled calorie reduction leading to a wide range of uncertainty around the predicted impact. For example, the impact assessment assumes reductions in checkout sales for in-scope products of 70% with the likely value being between 16%-90%. Such a significant range leaves considerable uncertainty regarding the policy's impact.
- **The role of healthier swaps should be recognised:** Nesta research suggests that many small changes – such as switching to a reduced sugar cake or lower fat crisp – could reduce calorie consumption by 8.5% and halve obesity rates in five years<sup>vi</sup>. This shows that healthier choices within a category could play an important role in reducing obesity. The current NPM and HFSS regulations encourage businesses to invest in these alternatives which help nudge consumers to healthier options. However, many of these realistic within-category swaps would be reclassified as 'less healthy' under the 2018 NPM, risking people switching back to more indulgent, calorie-dense options.
- **Consumer choice will be hit:** Simply put, the 2018 NPM sets the bar unachievably high for many categories. Analysis by Oxford Economics<sup>vii</sup> found that over 1 in 10 products that are currently classed as 'healthier' and would be re-classified as 'less healthy' under the 2018 NPM, are expected to be withdrawn from shop shelves. This raises significant concerns about the risk of reducing consumer choice in healthier options, including those developed by companies to support the current regulations.
- **Impact on fibre and micronutrient consumption:** The government has only considered the obesity impacts of this policy, but we know that the average person in the UK doesn't consume the recommended intake of key nutrients, such as fibre and iron<sup>viii</sup>**Error! Bookmark not defined.**, and this constitutes a risk for population health. However, many nutrient-dense foods will be significantly affected by these proposals. The 2018 NPM will reclassify almost all breakfast cereals, fruit yoghurts and fruit juices as "less healthy", despite their contribution to key micronutrients.

The health benefits of implementing the 2018 NPM are unclear. The daily 9-13 calorie reduction estimate in the Impact Assessment is based on such limited evidence, it's impossible to gauge how accurate it is. But it's clear there will be a significant impact on food and drink manufacturers. It puts at risk investment in healthier products, while adding significant cost, at a time when the sector is already under strain from rising supply chain disruptions and regulatory pressures. Based on their survey, Oxford Economics estimates that the average one-off cost for manufacturers would be approximately £2,812 per product – some 50 times higher than the government's estimate<sup>vii</sup>. Evidence also suggests that industry-wide cost increases are, at least partially, and sometimes fully, reflected in consumer prices<sup>vii</sup>.

It is critical that government works with industry to ensure that future policy proposals are practical. The free sugars criteria of the 2018 NPM, for example, imposes a significant technical challenge, leading to inconsistent results – which is not suitable for regulation or enforcement. We urge government to rethink this policy and instead work with industry to ensure we can continue to make positive progress towards healthier diets.

## References

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- <sup>i</sup> Worldpanel by Numerator - GB Take Home Food & Drink - Nutrient volume contribution (percentage difference), FDF total members, 2025 vs 2021
- <sup>ii</sup> Worldpanel by Numerator - GB Take Home Food & Drink - sales weighted average Nutrient Profile Model score, FDF total members, 2021, 2025. The average NPM score of FDF total member products is 3.3 in 2025, compared to 3.8 in 2021. A score above 4 for food is considered 'less healthy'
- <sup>iii</sup> Action on Fibre members self-reported data. The initiative was launched in 2021 and the data includes fibre contributions from sales of all products launched as part of the initiative from 2022 to 2025
- <sup>iv</sup> [Did High in Fat, Sugar, and Salt \(HFSS\) product placement legislation in England lead to reduced HFSS purchases? An interrupted time series analysis \(2025\)](#)
- <sup>v</sup> [Changes in food purchasing behaviour and the impact on diet and nutrition: 2021 to 2023](#)
- <sup>vi</sup> [Nesta: Improving diets to halve obesity across Britain](#)
- <sup>vii</sup> Oxford Economics (2026) A critical review of HMG's impact assessment on shifting to the NPM 2018 for promotion and advertising restrictions
- <sup>viii</sup> [National Diet and Nutrition Survey 2019 to 2023: report - GOV.UK](#)