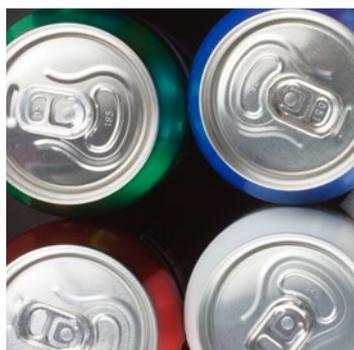




FEEDING CHANGE





Ian Wright CBE,
Chief Executive

The UK is very proud of its food and drink. UK consumers have access today to a wider range of safe, high-quality and nutritious food and drink - at all price points - than ever before.

Food and drink is the UK's largest manufacturing sector, providing jobs for some 400,000 people and contributing nearly £25 billion to the UK economy each year.

Innovation, whether to enhance productivity, safety, choice, flavour, quality or nutrition, is central to what we do. Many of the world's food companies choose to conduct their research and development here in the UK.

Moreover, food and drink is also part of our vital national infrastructure. If you can't feed the country then, pretty soon, you don't have a country. Today's complex, inter-dependent supply chains and just-in-time working patterns mean that our supply of food is potentially fragile.

Food and drink are not just commodities. They are deeply embedded in our history and our culture. Our relationship with food and drink goes way beyond its intrinsic nutritional value; eating and drinking and the occasions that surround them are part of what defines us.

It is partly for this reason that the UK's obesity challenge is so intractable. It has been clear for some time that too many of us, on average, consume too many calories. Rates of obesity for both adults and children are much too high - and particularly so among those in the lowest socio-economic groups.

Food and drink manufacturers have for many years been active participants in the fight against obesity. We will be for many years to come. It cannot be solved without us; though we cannot solve it alone.

The pace of this work is accelerating. It can be seen on every supermarket shelf whether by way of reformulation - changing the recipes of products - or in changing to more appropriate portion sizes. Marketing mix is also important as consumers are encouraged to consider healthier choices and innovation to increase the range of options available.

This report summarises our continuing commitment to diet and health policy issues. It sets out examples of the great work that is going on in that field in countries across the UK. It is a record of real achievement and one of which we are all enormously proud.

Kate Halliwell,
Head of UK Diet
& Health Policy

Health and nutrition sits at the heart of our members' work. At a time when one in three children are leaving primary school overweight or obese, industry's ground-breaking work to tackle this issue is more important than ever.

For over 20 years, long before the introduction of Government initiatives such as the Soft Drinks Industry Levy and the Sugars Reduction Programme, companies have been working hard to improve the nation's health. Large amounts of salt and, more recently, sugars and saturated fat have been removed from the national diet thanks to voluntary action from the industry. We recognise more needs to be done, and our commitment remains strong.

Many ingredients in a food perform a wide range of functions, which vary depending on the product and go well beyond adding flavour, providing texture and extending shelf-life. Sugars, for example, play multiple roles in food - providing the colour and rise in cake, and helping keep ice cream soft by lowering the freezing point. To reformulate successfully often means overcoming complex technical difficulties, which is both time and resource heavy.

FDF were pleased in 2017 when PHE's focus moved onto calories - we have long called for a whole diet approach to tackling obesity. Focusing on the role of individual nutrients or ingredients does not help consumers to build a realistic approach to their diet, lifestyle or general health.

In this report, we aim to provide a snapshot of the great work FDF members have done to improve the nation's diet using methods such as: reformulating products, ensuring appropriate portion sizes, innovating to provide healthier options, adjusting marketing mix, and supporting people to be physically active. This is alongside providing clear nutrition labelling and ingredient lists on packs to help people make informed choices.

FDF and its members recognise the role they play in tackling obesity, but we cannot do it alone. Through continued collaboration with Governments across the UK and other industry stakeholders, we are committed to being part of the solution and to improving the nation's diet.



It is widely agreed that eating a balanced diet and being physically active is the best recipe for staying healthy. Despite this, many of us are not getting enough exercise and consuming too many calories, whilst not eating enough of certain foods particularly those that are fibre-rich, including fruits and vegetables.

Obesity in the UK is a major problem. More than a quarter of adults are obese. In children, one in five entering primary school and one in three starting secondary school are overweight or obese. The health implications associated with being overweight or obese are numerous; type 2 diabetes, coronary heart disease, and cancer.

There is also a strong link between poverty and weight. For example, children in the most deprived communities are twice as likely to be obese compared to those in the most affluent. This means that alongside population based interventions, such as the reformulation of household foods, there is a need for targeted interventions to improve health in these communities and decrease social inequalities.

The number of calories we eat is clearly critical in helping to solve the obesity crisis, and helping people reduce their intake

where necessary is an important role the food industry can play. But a balanced diet means more than just calories, and it's not all about cutting back on certain foods. Most people do not eat enough fibre and yet there is strong evidence that diets full of fibre lower the risk of heart disease, stroke, type 2 diabetes and some cancers. Similarly, most people do not eat enough fruit and vegetables which not only give us fibre, but are also important for a range of nutrients. Oily fish is another food that brings lots of health benefits but as a nation we eat very little of.

Food and drink manufacturers are proud of the food we make and our track record of anticipating consumer trends and meeting consumers' needs. We know we have a responsibility to help people achieve a balanced diet. We provide healthy options which people want to eat but are also convenient and can fit into today's lifestyles, as well as reformulating products and ensuring appropriate portions. We will continue to play our part, but we cannot solve the nation's health issues alone and call on Government to ensure a genuinely holistic obesity strategy is introduced and delivered, beyond interventions aimed at food companies.



CHANGING RECIPES FOR HEALTH

A Producer's Reformulation Journey



Monitor customer and consumer response to the new product

RECIPE CONSIDERATIONS:

- > Reformulation aim/s
- > Nutrition information and allergens
- > Legal constraints
- > How product compares to others in market
- > Government policy and/or targets
- > Cost implications
- > New ingredients – are they approved?
- > Portion size

PROCESS CONSIDERATIONS:

- > Ingredient functionality i.e. what you need to replicate
- > Impact on shelf-life/safety/consumer acceptability
- > New ingredients, technologies or supply chain changes
- > Whether the new recipe will work in existing machines e.g. is it thicker? Will it set at the right temperature?
- > Cost implications if new machinery is needed
- > Impact on packaging

- > Monitor food safety, shelf-life and sensory characteristics
- > Get feedback via professional and consumer testing on ingredient list changes and sensory characteristics: taste, colour, smell, shape and appearance

- > Plant trials checklist:
 - > Time needed in factory
 - > Impact on line efficiencies
 - > Necessary plant changes
 - > Testing: Shelf-life, consumer, nutritional, micro-testing and food safety testing via HACCP*
 - > Cooking and preparation instructions
 - > Brand and business approval

*Hazard Analysis and Critical Control Point

DID YOU KNOW?

- > In order to make a reduced fat/sugar/calorie claim, a product must contain at least 30% less fat/sugar/calories compared to similar products on the market
- > Even seemingly minor reformulation changes require shelf life testing to ensure that food safety and quality aren't compromised
- > Reducing the amount of sugar and fat in a product, substituting ingredients and/or changing portion sizes can all have an impact on a product's cooking instructions



Reformulation

Expert View: Leatherhead Food Research

From surveying our consumer panels, we know that a healthy diet is becoming increasingly important to people. Leatherhead Food Research's recent questionnaire revealed that 44% of UK consumers are trying to eat less sugar, 8% are trying to eat more protein, 5% are trying to exclude gluten and 6% are trying to cut dairy from their diet. However reformulation is not easy. Reformulation has an impact on flavour profiles, sweetness profiles and many elements of texture, colour and visual appeal. This means that consumers will lose those characteristics they are looking for in a product when the sugar is simply removed or replaced with sweeteners. Sugars affect many properties of foods, as well as adding shelf-life stability and food preservation. For example in biscuits and cakes, sugars affects starch gelatinisation which alters how it cooks; so a reduction in sugar will affect the product's textural properties and how well it holds the air on baking. Understanding the science behind these changes is key to successful reformulation. Food and drink regulations also need to be considered so that products are legally described.

Consumer data comes from Leatherhead Food Research; nationally representative survey with 2,069 UK consumers, September 2016

leatherhead food research



LUCOZADE RIBENA SUNTORY

Lucozade Ribena Suntory (LRS) is committed to having a positive impact on consumers' lives. Since 2017, the company has reduced sugar by 50% on average across its core range and created zero/reduced calorie alternatives for every brand. In total, LRS has removed 25,500 tonnes of sugar and 98.1 billion calories from its portfolio, providing consumers with a responsible choice of great-tasting drinks.



COCA-COLA GREAT BRITAIN

In May 2016 Coca-Cola reduced the sugar in Fanta Orange. Fanta Orange was first reformulated back in 2006, with a 33% reduction in sugar. Following the most recent reformulation it now contains just 4.6g of sugar per 100ml, meaning it will also be Soft Drinks Industry Levy exempt. Since the reformulation, Fanta has grown in volume by 19.7%, with really positive consumer feedback. The reduction forms part of a wider strategy, which helps consumers to reduce their sugar intake. Since 2005, the company has changed the recipe of 34 of its drinks.



PREMIER FOODS

Premier Foods have reduced sugar in their Mr Kipling Viennese Whirls by 6%, removing circa 50 tonnes of sugar from the UK diet, as well as reducing total sugar in their Ambrosia Devon Custard by 7% (in added sugar 13% reduction), removing approximately 200 tonnes of sugar from the UK diet. The company has also reduced sugar per serving in their Cadbury Cake Bars by 4.6% and in their Cadbury Cake Bars Caramel by 2.5%.



MACPHIE

Macphie has produced a range of cake mixes and frostings which have been reduced in sugar by 30%, without compromising on taste or quality. Their reduced sugar range replaces sugar with inulin – a vegetable fibre made from chicory root which is 100% natural. Macphie is now looking to expand the healthier alternative range across more of its existing products, including its biscuit and flapjack products.



PRINCES

In 2015, Princes completed a project to reformulate its range of Juicee squash to 100% no added sugar. The entire range of Juicee soft drinks is now free of any added sugar. Less than 0.5% of Princes' annual branded sales volume contains added sugar, and no brand produced by Princes will be affected by the Soft Drinks Industry Levy. Overall, over 45 million calories have been removed from own label soft drinks supplied by Princes since 2011.



PEPSICO

At the end of 2017, regular 7UP was reformulated to contain 30% less sugar and fewer calories. It now has seven grams of sugar per 100ml. Over the last 10 years PepsiCo have removed 55% of salt across savoury snacks, and 25% from their standard potato crisps. Such key developments enabled the company to meet the salt reduction targets of the Government's voluntary Responsibility Deal by 2012. PepsiCo also plans to reduce added sugars in selected Quaker products in the UK by an average of around 16% by mid-2019.



General Mills have reduced sugar by 17% in Petits Filous in a significant recipe reformulation that has also seen vitamin D fortification increased to 50% of your daily recommended amount per portion. The recipe changes extend across Petits Filous fromage frais small and big pots and was introduced at the end of November 2016. The meaningful sugar reduction will see sugar levels reduced to 9.9g per 100g. One serving of Petits Filous (2 x small pots, 94g) will now contain 9.3g of sugar and Petits Filous big pot (85g), 8.4g of sugar.



Leading to Better
KERRY TASTE & NUTRITION



DairySource

Kerry uses their deep understanding of taste and nutrition to provide solutions in the development and reformulation of foods and beverages. For adding back the taste profile that is lost when sugar is removed, Kerry's TasteSense™ technology enables up to 50% sugar reduction and is declared a natural flavouring. It addresses all product challenges; sweetness optimisation, mouthfeel and masking, and can be used across a variety of foods and beverages. Kerry also developed DairySource™ to replace or reduce fresh cream. A creamy indulgent taste is experienced while the product contains less fat content (up to 40%) and fewer calories (20%).



Nestlé & General Mills
Cereal Partners UK

CEREAL PARTNERS UK (NESTLÉ CEREALS)



Nestlé have reduced sugar in many of their cereals. Across the Cookie Crisp, Honey Cheerios, Honey Nut Shredded Wheat, Coco Shreddies, Frosted Shreddies and Multigrain Cheerios ranges, Nestlé have reduced sugar by between 1.2% and 6.2%. The reformulation of Nestlé Multigrain Cheerios is expected to reduce the sales weighted average for sugar/100g of Nestlé breakfast cereals by 2.9%, removing 250 tonnes of sugar annually.



THE JORDANS & RYVITA COMPANY

The Jordans & Ryvita Company cut the added sugar in Jordans baked breakfast cereals by a sales weighted average of 10% between 2014 and 2015 through gradual changes to the composition of its recipes. The business, which also removed added salt from all Jordans products in 2009, operates an internal nutrient profiling model that places an emphasis on product reformulation to remove salt, fat, saturates and added sugar from recipes, while adding in more fibre, whole grains, fruits, nuts and seeds.



Reformulation



McCain

As a responsible food manufacturer, McCain Foods is committed to ensuring their products can be enjoyed as part of a healthy, balanced diet. Through reformulation, they have reduced salt in products by 22%, and saturated fat by 70% since 2001, and they remain committed to future reformulation work.



WEETABIX FOOD COMPANY

With sugar levels already 30% lower than the category average and below Public Health England's 2020 guidelines, Weetabix Food Company have successfully decreased their low levels of sugar further. Even for Weetabix Original, already one of the lowest sugar cereals available, they have reduced sugar by 5% to just 4.2%; this is now less than half a teaspoon of sugar per two biscuit serving, a quarter of this due to naturally occurring sugars in their British grown wheat. They have also reduced sugar across their growing Weetabix On The Go drinks range by 44%, now less than 5g of sugar per 100ml.



Good Food, Good Life

NESTLÉ UK & IRELAND

As a major food and drink business in the UK and Ireland with more than 80 brands, Nestlé have a huge responsibility to help improve public health. They have an ongoing programme of research and development to improve their products in both taste and nutrition over time. Nestlé UK and Ireland has cut 2.6 billion teaspoons of sugar and removed more than 60 billion calories from products since 2015 whilst maintaining the great taste. Some of the biggest examples of reformulation to reduce sugar and calories in its famous brands over the last three years include KitKat®, Milkybar®, Cheerios® and Sanpellegrino®.



MONDELĒZ INTERNATIONAL

Mondelēz International has been heavily invested in wellbeing strategies since the company's inception in 2012. Their work is supported by over 40 internal Mondelēz International Nutritionists, Dieticians and Food Scientists including public health professionals who partner with external experts. In 2016, Mondelēz International Reformulated Cadbury Highlights, achieving a 8.5% sugar reduction which is 9% reduction per portion with milk.



KP SNACKS

KP Snacks' mantra is 'Creating more happy snacking moments.' They've been working on improving the health credentials of their products for several years. All their fried snacks (including nuts) are cooked in 100% sunflower oil and they've reduced saturated fat by 80% in many of their core brands since 2005. Since 2005 they've reduced salt in Wheat Crunchies by 55%, Discos by 47%, Hula Hoops by 42% and in core McCoy's crisps flavours by 25%. Their range is 100% free from artificial colours, 92% free from added flavour enhancers, 98% free from artificial sweeteners and 83% free from artificial flavours.



Portion Sizes

British Nutrition Foundation - Why reduce portion sizes?

To tackle obesity, we've got to think about how much people are eating as well as what they are eating. It's been estimated that reducing our exposure to large portion sizes could lower our calorie intake by up to 16%. This has been clearly recognised by Public Health England - reducing portion sizes is a key feature of its sugars reformulation strategy for manufacturers, retailers and the out-of-home sector.



For the food industry, it's important to understand what consumers want from portion size information and how they might react to different sizes when choosing foods and drinks. This is particularly relevant for some snacks as these can be the high in salt, fat and/or sugar which we're encouraged to eat less of, and are likely to be pre-portioned, meaning the portion size provided can represent a 'normal' amount to consume in one sitting for a consumer.

Some countries include portion size information for consumers as part of their food based dietary guidance, but in the UK we only have portion size guidance for certain foods. The British Nutrition Foundation is currently developing a resource on portion sizes, which aims to complement the Eatwell Guide and help consumers put healthy eating advice into practice. This should be published later this year.

Portion size is a growing priority for public health and one where the food industry can be an integral part of the solution.



HARIBO

As part of a responsible approach, HARIBO takes great care to ensure they offer a variety of pack sizes and provide clear portion and nutritional information on pack to help consumers make the right choices for themselves and their families. HARIBO's best-selling mini-bags have been standardised to 16g (55kcal) and 25g (86kcal), meaning that all mini-bags are well within Public Health England's target for single serve items being less than 150kcal. HARIBO has also made a number of on-pack labelling changes in order to provide further portion guidance.



FERRERO

Ferrero has always created treats that bring a little bit of pleasure to people's lives. It's products can be enjoyed as an occasional treat as part of a balanced and varied diet. Small portions help people enjoy treats in moderation - 95% of its products come in portions less than 150kcal.



loved snacks for nearly 70 years. They have listened carefully to both their retail partners and to shoppers, to identify what people want from their snacks. KP makes a wide variety; something for everyone to suit all sorts of tastes, events and occasions. They already have 23 packs that are 100 calories or fewer per portion, including Pom-Bear, Skips, Space Raiders and Hula Hoops Puft.



UNILEVER

As part of the Unilever Sustainable Living Plan, in the UK the company introduced 'calorie caps' on all of their hand-held ice creams as they believe there is a place for occasional treats within a balanced diet and active lifestyle. For children, this means that as part of their 'Responsibly made for kids' promise, all Wall's kids ice creams with this logo have been formulated according to their set nutritional criteria and have up to 110kcal per serving. For adults, they have also capped the calorie content of individual serve ice cream, including Magnum, at 250kcal per serving.



KP SNACKS

Leading snacks manufacturer KP Snacks has been making some of Britain's best-



MONDELĒZ INTERNATIONAL

As part of the chocolate industry's commitment to ensuring all single serve chocolate confectionary products are under 250 kcal per serving, Cadbury Bar and Half products were delisted. Mondelēz International increased portion control options across all products by 26% in 2015. The company are part of the Be treatwise initiative, actively encouraging people to be treat wise and enjoy treats occasionally with BeTreatwise prompts on pack and re-sealable packaging.

Healthier Options

Expert View: Leatherhead Food Research

Healthier options can mean a range of things. As part of a healthier diet, a reduction in the levels of sugar, fat and salt are recommended. 39% of UK consumers are looking for healthy products that make them feel full for longer, 19% are looking for products containing key vitamins and minerals and 17% want products to match their personal dietary and nutritional needs. As with sugars, salt and fat have functional roles in foods, giving flavour, texture, lift and preservative effects. Using science to underpin and explain these sensory properties allows the product developer to identify the functional roles precisely and make a healthier product that meets customers' requirements. For example, fat reduction can be achieved by restructuring the water and oil in an emulsion such as a mayonnaise or salad dressing. By changing these emulsions from a standard high oil in water system to a water-in-oil-in-water (WOW) emulsion the level of fat can be reduced significantly but the creaminess and flavour retained. Regulatory issues are also important. For example, the claims "light" and "reduced" can be used as a comparative claims, provided that the conditions of use are being met. Comparative nutrition claims are widely used by the food industry as a powerful marketing tool to inform consumers about healthier options.

Consumer data comes from Leatherhead Food Research; nationally representative survey with 2,069 UK consumers, September 2016

leatherhead food research



HARIBO

In response to consumer demand and as part of their commitment to helping people make the right choices, HARIBO has bought a new product, Fruitlicious, to market this year that is 30% lower in sugar than the category average. With 33g of sugar per 100g, the sweets have entered the UK market with the lowest sugar content per 100g, compared with other similar products in the category.



LUCOZADE RIBENA SUNTORY

Lucozade Ribena Suntory (LRS) has reduced sugar by 50% on average across its core range and created zero/reduced calorie alternatives for every brand. Committed to having a positive impact on consumers' lives, future drinks will be healthier too, like recent launches Lucozade Sport Fitwater and True Nopal Cactus Water.



COCA COLA GREAT BRITAIN

The Coca-Cola Company has continued to put significant investment in its zero-calorie portfolio, recently unveiling the newest TV commercial for Coca-Cola Zero Sugar. Coca-Cola Zero was relaunched in 2016 with a new recipe, new packaging design, and the name 'Coca-Cola Zero Sugar' to make its sugar-free credentials even easier for consumers to identify. Since its relaunch, the product has become the UK's fastest growing cola, growing by 41.3% on the previous year. This work has significantly helped to shift the mix of cola volume to light colas.



KELLOGG'S

As part of its Better Starts initiative to provide families with healthier choices Kellogg's has launched a new organic and vegan range of cereals, including no added sugar cereals and granolas. The range includes: Coconut, Cashew and Almond Granola (no added sugar): 5.4g of sugar per 45g serving, Apricot and Pumpkin Seed Granola (no added sugar): 7.2g of sugar per 45g serving, Classic Wheats (no added sugar): 1g of sugar per 40g serving, Raisin Wheats (no added sugar): 5.9g of sugar per 45g serving and Super Grains Granola: 11g of sugar per 45g.



PREMIER FOODS

Premier Foods have extended their "Better-For-You" options with three new variants of slices; Rockin' Raspberry, Awesome Apple and Smashing Strawberry. These have 30% less sugar compared to Mr Kipling Angel Slices. They have also created Ambrosia My Mini custard pots with a 30% reduction in total sugars in two varieties: standard and banana. Finally, the company have also created three "Better-For-You" variants in their bestselling Sharwood's sauces. Sharwood's Tikka Masala and Korma cooking sauces both now come in an alternative 30% reduced fat version. A 30% sugar reduced Sweet & Sour Chinese sauce has also been developed.



McCAIN

McCain Food's focus on innovation ensures they offer consumers a variety of tasty, convenient and nutritious products. This includes their Rustic Chips and Ready Baked Jackets, which each have four green nutritional indicators, and their foodservice 'Simply' range, which offers caterers operational solutions. Overall, 95% of their retail portfolio carries green or amber indicators across all nutrients.



PRINCES

Napolina, the UK's number 1 Italian cooking brand, is launching two first to market 'No Added Sugar' pasta sauce ranges - helping consumers to reduce their sugar intake without compromising on taste. The ranges have been developed in response to the changing market, which has seen increased demand for consumers seeking healthier diets, with a recent focus on reducing sugar intake. A 500g range, aimed at families features popular flavours including Tomato & Hidden Veg, Bolognese and Sauce for Meatballs while smaller households are catered for in a 350g jar with popular flavours including Tomato & Basil and Tomato & Chilli.



KP SNACKS

KP Snacks' product development programme aims to deliver tasty new products to suit different tastes and occasions, including introducing permissible snacks. In 2015, KP launched Hula Hoops Puff; a light and floaty version of their iconic Hula Hoops brand, with 72 calories per 15g pack and with the same much-loved taste consumers expect. In 2016, they launched KP Unsalted Roasted Peanuts,



tapping into growing consumer demand for lower salt products. Peanuts provide a source of protein, are high in fibre and contain essential vitamins and minerals. The majority of the fat in peanuts is naturally occurring and nearly 80% of the fat is unsaturated.



BRITVIC

Recognising that their consumers are increasingly looking for lower sugar drinks that don't compromise on flavour, in 2015 Britvic took the bold decision to cease production of added sugar Robinsons. Today Britvic only produces Robinsons No Added Sugar squash in the UK, cementing its position as the no.1 squash brand in Great Britain. This action has removed over 6.8 billion calories from UK diets on an annualised basis. In 2016, Britvic took Robinsons into dispense in various foodservice outlets, and in 2017 launched Robinsons Refresh'd made with real fruit and naturally-sourced ingredients for a low-calorie, no added sugar option on-the-go.



PEPSICO

More than half of Pepsico's product portfolio is now defined as 'healthier' according to OFCOM standards. PepsiCo's recent innovation has focussed on no-sugar/low calorie products including Pepsi MAX Cherry and Pepsi MAX Ginger. Quaker launched a Granola range with 30% less sugar and fat than the average Granola on the market. Furthermore, 60% of PepsiCo's single serve savoury snacks are now 130 calories or less.



MARS WRIGLEY CONFECTIONERY

Mars Wrigley Confectionery is working proactively to reduce sugar in the market by introducing innovative new options for consumers. The latest launch, STARBURST® sugar-free chewing gum, cleverly bridges the gap between gum and candy so that consumers can enjoy the fruity fusion of STARBURST® flavours in a new and exciting sugar-free way.



BEN & JERRY'S

Following the launch of Ben & Jerry's Non-Dairy range, as part of an ongoing commitment to meet people's dietary needs and desires, Ben & Jerry's introduced Moo-phoria light ice cream a lower calorie, lower fat option. The range includes Chocolate Cookie Dough, 132kcal per 100ml and Caramel Cookie Fix, 128kcal per 100ml.



Healthier Options



BREYERS DELIGHTS

Launched in January 2018, Breyers Delights is churning up the ice cream aisle with its four deliciously creamy ice cream flavours. With a third fewer calories than other ice creams, it's lower in sugar, high in protein and big in taste. Tapping into the wellness trend, the Breyers Delights range contains between 290kcal and 350kcal and up to 20 grams of protein* per tub. Made with a purified extract of the Stevia rebaudiana leaf and less sugar than standard ice cream, those who choose a healthy lifestyle can limit their calorie intake whilst still treating themselves. *protein contributes to the maintenance of normal bones.



THE HEALTHY FOOD DEVELOPMENT

The Healthy Food Development Ltd have launched two new products; "LowGicFood Cakes" Lemon Almond and Cherry Bakewell Slices. The two products have 7 benefits in every slice: no added sugar, under 200kcal per 85g slice, high in protein, high in fibre, low in carbohydrates, low in GI, and reduced fat.



Good Food, Good Life

NESTLÉ UK & IRELAND

Nestlé researchers made a scientific breakthrough transforming the structure of sugar through a new process using only natural ingredients. This allows someone to perceive the same level of sweetness while consuming less sugar. This has led to the new Milkybar Wowsomes bar which has 30% less sugar than similar chocolate products and contains no artificial sweeteners, preservatives, colours or flavourings. Other products with lower/no added sugars include Rowntree's® 30% less sugar Randoms and Fruit Pastilles, Nesquik® Chocolate 30% less sugar, Nescafé® 2in1 and Unsweetened Taste Nescafé® Gold Cappuccino, Latte and Decaff Cappuccino which contain low sugar, and Nescafé Dolce Gusto® Skinny Latte and Cappuccino which contain no added sugars.



PLADIS

pladis has recently launched a range of sugar-reduced go ahead! products as part of its Health and Wellbeing programme. The recipe changes will remove 347 tonnes of sugar each year, with reductions of 10% in Crispy Fruit Slices & Yoghurt Breaks, and between 22-40% in Fruit Bakes. The revised recipes contain fewer calories, and Fruit Bakes have been renamed Fruit and Oat Bakes because of the addition of more oats to the snacks. The changes have been extended across the go ahead! portfolio, with the launch of a range of no added sugar Goodness bars.



GENERAL MILLS

GENERAL MILLS

Product innovation is another key way General Mills are helping to reduce sugar from children's diets. In 2016 they launched My Petit Filous, a vanilla fromage frais for babies from six months. With just 4.5g of sugar per portion, it is the lowest sugar flavoured fromage frais on the market.



THE JORDANS & RYVITA COMPANY

The current focus of the Jordans & Ryvita Company is on using less added sugar, which plays an important role in the texture and structure of 'cluster' based baked cereals in particular. Over the past twelve months the business has launched a range of low sugar granola products, made using chicory root fibre as a replacement for added sugar. They are also currently working as part of a project co-funded by Innovate UK, with The University of Nottingham and other specialist partners, exploring how to reduce the amount of added sugar within its cereal bar recipes.



MONDELÉZ INTERNATIONAL

Mondelēz International successfully reformulated and launched Trebor Mighties as a sugar-free brand extension of the Trebor range, in Mint and Berry Mint varieties, and launched sugar-free Halls in 2016.



Beyond Food



LUCOZADE RIBENA SUNTORY

Lucozade Ribena Suntory (LRS) is investing £30m in its 'Made to Move' campaign. Fronted by unified world heavyweight champion Anthony Joshua, the campaign seeks to inspire one million people to move more over a three year period. LRS employees are taking an active part in the campaign, including an intra-company walking competition last summer where 69.6 million steps were clocked up in a month - nearly 1.5 times around the earth. Due to its success, the company is doing the competition again this spring and it has been adopted as a global walking challenge between Suntory companies across the world.



COCA-COLA GREAT BRITAIN

Coca-Cola's Parklives programme helps to address inactivity, loneliness and isolation by offering members of the community the ability to take part in free activities such as zumba and tai chi, hosted in their local parks. Parklives operates in ten cities with an additional 35 locations through a partnership with charity StreetGames. The programme brings families and communities together and allows people to use green space better. From 2014-2016 Parklives had a total of 469,383 attendances, and successfully enhanced community cohesion in all age groups.



PEPSICO

For more than a decade, all of PepsiCo's cola advertising has focused on no-sugar Pepsi MAX – 61% of their carbonated soft drink sales are now in no-sugar variants. Similarly, only the company's no-sugar 7UP Free features in their 7UP advertising and marketing. Across all media, there is no marketing of their HFSS products to under-16s and PepsiCo signed up to front of pack labelling in 2013.



McCAIN

McCain Foods was the first UK food manufacturer to adopt front-of-pack, colour coded labelling – an important step in supporting consumers to make informed purchasing decisions. Alongside this, they always aim to promote their products responsibly and never market products to children under the age of 12. They are committed to offering consumers good food that can be enjoyed by all.



Nestlé & General Mills Cereal Partners UK

CEREAL PARTNERS UK (NESTLÉ CEREALS)

Cereal Partners UK, who manufacture Nestlé cereals, launched a Star Wars promotion on only their healthiest cereals (including Gluten Free products). All products that carried the promotion were non-HFSS and averaged just 3g of sugar and 0.2g of salt. The products chosen were: Cheerios, Low Sugar Oat Cheerios, Shreddies, Shredded Wheat, Bitesize Shredded Wheat, Go Free Cornflakes, Go Free Rice Pops.



Beyond Food



HAMLINS OF SCOTLAND

Hamlyns of Scotland provide a range of products including traditional porridge oats and oatmeal through to convenient quick-cook porridge sachets and instant porridge pots for a healthy breakfast on-the-go. Hamlyns is part of Business in the Community Scotland's 'Healthy Breakfast Challenge', where children from primary schools learn about the nutritional content of breakfast foods and the importance of a balanced diet. The pupils undertake a month-long breakfast diary challenge - recording what they've had for breakfast in words and pictures, along with any exercise they've done. After a month, prizes are awarded for both creativity and healthy eating.



BIRDS EYE

Birds Eye has pledged to support the Food Foundation's 'Peas Please' initiative which aims to increase the consumption of vegetables in the UK and improve access to healthier choices through retail and foodservice. This includes increasing TV and online advertising for its vegetable offer by over 30% in 2018. The advertising positively portrays the benefits of vegetables, and will be shown during children's television and peak family viewing. Birds Eye has also pledged to increase choice in its product ranges, invest in nutritional messaging and work with supermarkets to grow the number of vegetable promotions in store.



Be treatwise
www.betreatwise.net

BE TREATWISE

Mondelēz International, Ferrero UK and Mars Wrigley Confectionery UK, have joined forces behind Be treatwise, an initiative that aims to help families keep treats special. The companies will collaborate with family decision makers and a panel of independent experts to identify possible solutions that will help parents and grandparents when it comes to treating, with the aim to trial at least one new initiative in market. A redesigned Be treatwise label will also begin appearing on the packaging of certain products and marketing of participating companies. More information can be found at www.betreatwise.net.

OUR INDUSTRY IN PICTURES

The UK food & drink manufacturing sector employs more than **117,000** EU workers almost **1/3** of our workforce



The UK is Ireland's largest trading partner for food and drink. **41%** of its food & drink exports go to the UK (€4.4bn)



Food & drink contributes **£28.8bn** to the economy



Soft drink companies have **reduced sugars** from their products by **19%** between 2013 & 2018



With the support of industry, the UK Government has **set up the most ambitious sugars reduction programme anywhere in the world** to help lower sugar in the national diet



The food & drink industry is the **biggest manufacturing sector in the country...**

...larger than automotive & aerospace combined



In 2017, total food & drink export figures were worth more than **£22bn**



Our top three export markets are **Ireland, USA & France**

Grow exports of branded food and non-alcoholic drink by a third...

FDF export ambition

...reaching **£6bn** by 2020



The food supply chain employs almost **4 million** people & generates over **£112 billion** of value for the economy each year



Our industry employs over **400,000** people



We will need **140,000** new recruits by 2024 to feed an expected population of **70m** people & meet market demands



Our industry has a turnover of **£97.3bn** accounting for **19%** of total UK manufacturing



fdf has pledged to triple apprenticeships within the food & drink industry by 2020





About FDF

The Food and Drink Federation (FDF) is the voice of the UK food and drink manufacturing industry, the largest manufacturing sector in the country. Our industry has a turnover of £97.3 billion, which is 19 per cent of total UK manufacturing, with Gross Value Added (GVA) of £28.8 billion. Food and drink manufacturers directly employ over 400,000 people in every corner of the country. Exports of food and drink make an increasingly important contribution to the economy, exceeding £22 billion in 2017, an increase of 9.7% on the previous year. The UK's 7,000 food and drink manufacturers sit at the heart of a food and drink supply chain which is worth £112 billion to the economy and employs four million people.

Our membership comprises manufacturers of all sizes as well as trade associations dealing with specific sectors of the industry. In representing the interests of our members, we focus on the following core priorities:

- > **Food Safety & Science**
- > **Diet & Health**
- > **Sustainability**
- > **Competitiveness**
- > **Brexit**

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