



 CELEBRATING
FOOD AND NUTRITION



Forewords



Kate Halliwell,
Chief Scientific Officer

Across every community in the UK, four million people play a part in producing a fantastic range of food and drink that is enjoyed at home and around the globe. At the FDF we are proud to be part of this, supporting food and drink manufacturers, the largest manufacturing sector in the UK. Their work means UK consumers have access to a wide range of safe, high-quality and nutritious food and drink - at all price points. That's an incredible achievement.

Over recent times, the food and drink supply chain has responded to a multitude of challenges, including impacts from the COVID-19 pandemic and exiting the European Union. Through it all the food industry proved itself to be agile and resourceful, responding to these challenges to keep food on shelves and the nation fed. We are so grateful to all our

#HiddenHeroes throughout the food supply chain who made this possible.

The pandemic also brought into sharp focus the need to improve public health and help people achieve healthier lifestyles. Obesity impacts far too many adults and children, particularly those in lower-socio economic groups. Beyond obesity many people's diets do not provide the nourishment they need. A recent study¹ showed that less than 0.1% of people met all the Government's Eatwell Guide recommendations.

This report provides an overview of the current diet and health landscape, and our companies ongoing work to support sustainable healthy diets. It sets out examples of the great work carried out by companies across the UK. It is a record of real achievement and one of which we are enormously proud.

Companies have already achieved a great deal, but there is much more to do. Net zero, plastics, food security, obesity – big societal problems which all UK governments are seeking solutions to. Undoubtedly the need to innovate and drive these agendas forward will form a backbone of the National Food Strategy and the Health Disparities White Paper.

We won't always agree on the way forward – marketing restrictions being a case in point. Such measures are considered a central plank in the obesity strategy, but we believe they will hinder innovation and put up the cost of food. This points to the need for evaluation and sunset clauses but shouldn't stop us continuing to debate and share ideas to drive forward change. Food and drink manufacturers are ready to continue their hard work in supporting the changes needed to ensure we have a food system that is sustainable, resilient, affordable and will help people to live healthier lives.



Amy Glass, UK Diet and
Health Policy Manager

Health and nutrition sits at the heart of our members' work. For decades, food and drink manufacturers have been dedicated to playing their part to reduce obesity rates and improve the nation's health.

Companies have been working hard to reformulate products and provide healthier and smaller portion options for many years and will continue to take bold steps. As a result, compared to four years ago, the FDF member products contribute 10% fewer calories, 12% fewer sugars, and 16% less salt to the average shopping basket². We recognise more needs to be done, and our commitment remains strong. Companies are in this for the long term. Successful reformulation takes time and innovation is often needed to overcome technical challenges. Most importantly, companies need to bring the consumer on the journey, so that consumers will try – and continue to buy - these healthier options.

The FDF and its members recognise the important role we can play in delivering healthier diets to the nation. We believe a more holistic approach is needed, not just focussing on what people need to reduce in their diets (such as calories, sugars, and salt), but also what should be increased (such as fruit, vegetables, and fibre). We believe that championing positive messaging is a helpful way to support people to achieve a more balanced, sustainable healthy diet.

We know that, on average, we do not eat enough fibre. Fibre brings a wide range of benefits to the diet including better digestive health and yet messaging around this seems to be lost. Industry recognises this gap and we were excited to launch 'Action on Fibre' in 2021 to help bridge the gap between fibre intakes and the dietary recommendation. We strongly believe action to help increase intakes of fibre is essential for long term health in the UK population which is why companies are proactively supporting this initiative.

In this report, we provide a snapshot of the great work undertaken by FDF members to improve the nation's diet using methods such as: reformulating products, providing appropriate portion sizes, and innovating to provide healthier options. The report also sets out the fantastic commitments of companies to help bridge the fibre gap, support local communities, and helping consumers to achieve more sustainable diets.

Through continued collaboration with governments across the UK we are committed to being part of the solution to improving the nation's diet.

1 - Scheelbeek P, Green R, Papier K, et al, Health impacts and environmental footprints of diets that meet the Eatwell Guide recommendations: analyses of multiple UK studies. BMJ Open 2020;10:e037554. doi: 10.1136/bmjopen-2020-037554

2 - Kantar Worldpanel data for FDF members, nutrient growth versus the overall volume growth (percentage difference) from 2017 – 2021



Current Diet and Health Landscape

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, consume too many calories and are not eating enough of certain foods that are fibre-rich, including fruits and vegetables.

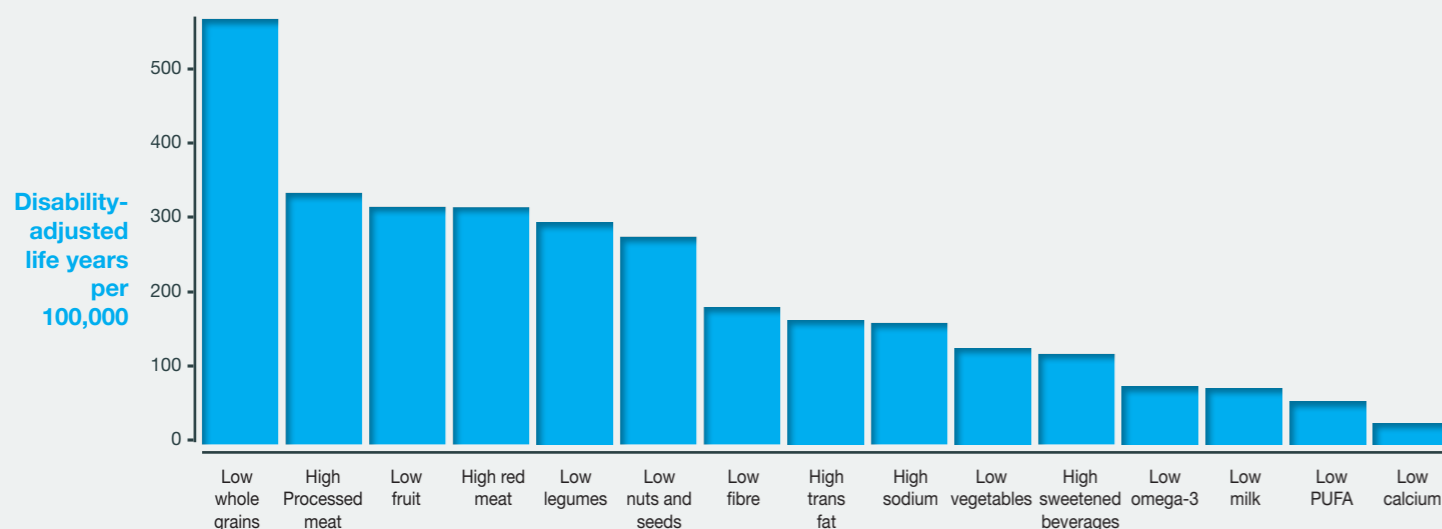
Obesity is a major problem in the UK, impacting 28% of adults³. During the Covid-19 pandemic, there has been a marked worsening of obesity rates in children, affecting almost 15% of those entering reception and 25% in year 6⁴. There are many health risks associated with obesity, including type 2 diabetes, coronary heart disease and cancer.

There is also a strong link between poverty and weight. For example, children in the most deprived communities are more than twice as likely to be overweight or obese compared to those in the most affluent⁴. 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 an important element of why people gain weight. Helping people to understand their intake and reduce it 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. Data from the Global Burden of Disease study⁵ shows that most of the top dietary risk factors in the UK are linked to the elements of the diet that we do not get enough of including whole grains, fruit, legumes, nuts, seeds and fibre.

A transition towards a more sustainable diet to improve the environmental impact of the food system and the inherent link this needs to have to a healthy diet is also of growing societal interest. Our members recognise the role and responsibility we play in helping consumers achieve a sustainable healthy diet and this is an integral area in their work on climate change and achieving Net Zero. Although much is still debated as to the 'ideal' sustainable healthy diet, moving people towards the UK Government's healthy eating advice, including increasing the amount of plants we eat, will be a step in the right direction⁶.

The Impact of Dietary Risk Factors in the UK



United Kingdom, both sexes, 2019

3 - Statistics on Obesity, Physical Activity and Diet, England, 2020
 4 - National Child Measurement Programme, England 2020/21
 5 - UK dietary risks, Global Burden of Disease 2019
 6 - Scheelbeek P, Green R, Papier K, et al, Health impacts and environmental footprints of diets that meet the Eatwell Guide recommendations: analyses of multiple UK studies. BMJ Open 2020;10:e037554. doi: 10.1136/bmjopen-2020-037554

Action on Fibre

The FDF has long called for a more holistic approach to the Government's nutrition policy, believing the focus should not just be about cutting down but also celebrating the role foods can play in a healthy diet. In 2021, we launched our 'Action on Fibre' initiative, in which companies commit to bridge the gap between intakes and the dietary recommendation. This will be achieved by making higher fibre diets more appealing, normal and easy for the population. At the start of 2022, 27 brands have signed up to Action on Fibre. We look forward to building this further and working with more companies in the years to come. However, to make a real difference, industry and Government must collaborate to ensure the messaging on the benefits of a high fibre diet are widely known, promoting greater awareness about which foods are higher in fibre and how they can be easily included in everyday family meals. This should also include increasing consumption of fruit, vegetables and fibre for those on lower incomes.

Who is involved?



Expert View



British Nutrition Foundation - Time to eat more fibre!

There is strong evidence that high fibre diets help reduce risk of heart disease and stroke, type 2 diabetes and bowel cancer as well as keeping the gut healthy. Yet, we eat much less fibre than recommended – just 19.7g per day for adults on average, compared to the recommended 30g per day. Less than 1 in 10 adults meet the recommendation.

The term 'fibre' includes different complex carbohydrates that we can't digest but which deliver various health benefits as they pass through the gastrointestinal tract. Some allow faeces to move more easily through the gut, and others influence how quickly we absorb nutrients such as sugar. Other 'fermentable' types of fibre are metabolised by our gut bacteria, producing substances that can be beneficial to our

health, such as helping control blood cholesterol, or increasing the 'good' bacteria in the gut.

Fibre-containing foods usually contain a mix of different fibre types, hence the importance of eating a variety of different foods, including wholegrains, fruits, vegetables, pulses, nuts and seeds. Not only is a plant-rich diet beneficial to our health, it is also good for the planet⁷.

The British Nutrition Foundation has resources to help people eat more fibre, including a 7-day meal plan and the 'Fun way to fibre' resource showing how simple swaps can increase fibre intake⁸.

The British Nutrition Foundation is a registered charity that delivers evidence-based information on food and nutrition to support healthy, sustainable diets.

7 - Steenson and Buttriss (2021) Healthier and more sustainable diets: What changes are needed in high-income countries?
 8 - More information at www.nutrition.org.uk.

Action on Fibre

Action on Fibre Framework:

Members have pledged a range of actions to help bridge the gap.



Participating companies have already launched some fantastic higher fibre products and initiatives to help bridge the fibre gap.

KP SNACKS



As nuts are naturally high in fibre, KP Snacks believe it has an important role to play in highlighting the fibre content of their nut range to consumers. As part of KP Nuts' range redesign in 2019, all peanut products have a 'High in Fibre' claim on the front of pack. They also have a 'Source of Fibre' claim on their Salted Cashews and Honey Roast Cashews, and their Peanut Butter jars contain a 'High in Fibre' claim on the back.

KINGSMILL



Kingsmill wants to help families across Britain increase their daily whole grain consumption, and in February 2021 launched two new loaves into the seeded market:

Kingsmill 50/50 No Bits Multi-Seed is baked with milled sunflower, oats and linseed. This clever loaf gives the benefits of whole grain from a 50/50 flour base with protein and providing a source of fibre, at 2.2g per slice, from seeds - all for a soft slice without any of the 'bits'!

Kingsmill's 50/50 Multi-Seed is baked with sunflower, pumpkin and linseeds, is a great tasting seeded loaf with the added benefit of whole grain from a 50/50 flour base. The loaf is also a source of fibre with 2.8g per slice, protein and omega 3 - all with a delicious crunch.

These two loaves have provided over 6 million fibre servings (Feb- June 2021) to the UK public.

QUORN FOODS



In 2021, Quorn launched Roarsomes – a vegan version of a classic children's favourite, the 'turkey dinosaur' but made with mycoprotein. Like meat, Roarsomes are not only a great source of protein but are also low in saturated fat and high in dietary fibre at 8.4g per 100g.

Roarsomes provide approximately 25% of the SACN daily recommended fibre intakes of children aged 4-10 years, and slightly over 25% in 11-18-year olds for average portion sizes of each age group. This is significant as swapping popular low in fibre meat products for alternatives which offer a significant fibre benefit can increase healthy intake into the diets of our children.

NATURE'S HEART



Nature's Heart develops delicious products inspired by nature. The most recent launch saw the unveiling of four wholesome snack bars made with the finest ingredients, bursting with natural flavour and are a natural source of protein and high in fibre.

Nature's Heart commitment to balance flavour and nutrition with immune system mixes launched in 2020. These mixes not only contain premium quality fruits, such as goldenberries, nuts and seeds but they are also a great source of fibre, iron and selenium that help contribute to the normal function of the immune system, making Nature's Heart the one stop shop to healthier snacking.



RYVITA

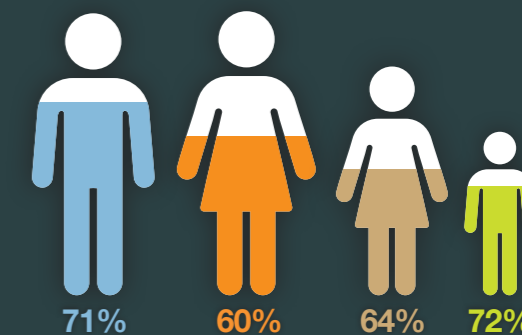


Ryvita's FibreFit campaign focused on helping consumers be healthier when they need it most.

From easy recipes, to quizzes, to 30g per day FibreFit challenges, they have educated consumers on the benefits of fibre for a healthy gut across social media.

Fronted by their brand ambassador, Davina McCall, Ryvita hosted its first virtual FibreFit Live event with a dance class, cook along and an expert panel with 15k signups and survey that showed half of the attendees said they would take action to increase their fibre intake. Ryvita also launched its FibreFit app to encourage consumers to track the fibre they were eating by scanning or inputting foods so they can take control of their fibre intake, their way.

On average men and women consume **71%** and **60%** of the recommended amount of fibre, respectively. Children consume only **64%** (11 - 18 years) and **72%** (4 - 10 years) of the recommended amount.



National Diet and Nutrition Survey: results from years 9 to 11 (2016/17 and 2018/19).

Reformulation and Healthier Options

The FDF and our members are committed to voluntary reformulation and innovation and have made substantial progress to date. As Leatherhead Food Research outline, this is not straightforward, but it is one of the most important measures food producers can take to improve health. More needs to be done, and we are committed to drive further progress. It is vital Government and industry work together on the development of practical voluntary targets with realistic timeframes, as well as incentives to drive further progress. We also believe greater endorsement of the benefits and safety of sodium replacers and sweeteners is needed. Over 97% of food and drink manufacturers are small and medium sized companies which have an equally important role in contributing to healthy and sustainable diets and the success of Government reformulation programmes. However, many lack the technical resource to deliver these goals and so the FDF will work with the UK and devolved governments to improve access to innovation support.

Expert View

Leatherhead Food Research - Reformulation and new product development



Companies of all sizes have long recognised the role they need to play in helping consumers to lead healthier lifestyles. Manufacturers have responded to voluntary UK Government programmes and regulations affecting food and drinks high in fat, salt and sugar, by creating healthier products and reformulating established ones. However, the decision to reformulate or develop a new product is never taken lightly. It adds cost and can be technically very difficult to maintain the sensory qualities of the original product.

Following the emergence of COVID-19, consumer demand for healthier products has shifted. A recent survey conducted by Leatherhead Food Research shows that 21% of UK consumers now place greater importance on healthier options with reduced fat, salt or sugar compared to before the start of the pandemic.

Food and beverage companies' reformulation strategies often focus on cutting these ingredients. This can include the use of novel ingredients and processing aids such as enzymes to perform a functional role. Alongside needing to ensure regulatory compliance, use of these can be a challenge with the growing trend for 'clean label' products.

Alternative approaches to reformulation look to increase the ratio of healthier ingredients, by adding protein, fibre, fruits, vegetables or nuts.

Whichever approach is taken, any claims made must be scrutinised to ensure they are compliant and don't mislead consumers. Reformulation is a fine balancing act that must consider scientific aspects of the recipe alongside product marketing, regulatory factors and consumer demand.

For today's consumers, healthier options encompass more than reducing the consumption of fat, sugar and salt. Healthy eating now extends beyond its traditional definition to cover wellness in the broader sense, embracing factors such as gut health as well as mental health and wellbeing. Leatherhead Food Research questioned consumers to see how COVID-19 has impacted what people want from food and beverage products, and the results show that the pandemic has augmented this trend.

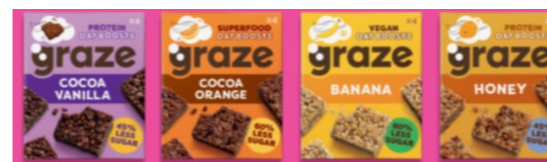
In the UK, 18% of adults said they place greater importance on products that make health benefit claims (e.g. immunity) following the pandemic. When it came to ingredients or products that support physical wellbeing the figure was 22%, and for ingredients or products that support mental wellbeing it was 19%.

This movement presents exciting opportunities for food and beverage product innovation. We've seen an uptick in the consumption of plant-based products for health reasons as well as increased use of ingredients that support specific aspects of health.

Any reformulation work needs to pay close attention to the ingredients used, especially those classified as novel and/or aligned with explicit health claims. Horizon scanning and regulatory awareness play a vital role here, ensuring existing and emerging regulations are considered alongside consumer trends.

Consumer data commissioned by Leatherhead Food Research. Figures are nationally representative from a survey of 2,086 adults in the UK, July 2021.

GRAZE



Graze has reformulated their cereal bar range, including five Oat Boosts recipes (Cocoa Orange, Banana, Honey, Lemon and Blueberry and Cocoa Vanilla), as well as their Lively Lemon Flapjack, reducing sugar by 32-60% across these products, from 20.3g to 29.3g sugar/100g before reformulation, to 9.8g to 16.7g sugar/100g after reformulation. The sugar reduction was facilitated through the use of chicory root, which provides natural sweetness. This has not only reduced overall sugar content of their products but also increased the fibre content significantly.

BEN & JERRY'S



At around 125 calories per serving, Ben and Jerry's Moophoria provides a lighter way for consumers to enjoy Ben & Jerry's ice cream. The Cookie Dough Moophoria contains 55% less fat, 61% less saturated fat and 20% less calories than Ben and Jerry's Cookie Dough original. Similarly, Salted Caramel Brownie Moophoria contains 58% less fat, 59% less saturated fat and 25% less calories than Ben and Jerry's Chocolate Fudge Brownie original.



SBF GB&I

SUNTORY BEVERAGE & FOOD GB&I



Since March 2018, all SBF GB&I existing core and new drinks with added sugar contain less than 5g of sugar per 100ml (approximately a teaspoon). They have also introduced zero and reduced calorie alternatives for every brand and have introduced new lower-sugar and less sweet drinks such as Ribena Sparkling and Lucozade Revive.

In total, sugar has been reduced by 57% on average across the core range. Regular Lucozade Energy, Ribena and Orangina has removed 25,500 tonnes of sugar and 98.1bn calories from people's diets, with an average sugar content across their drinks now at 3.7g per 100ml.

MCCAIN



As a responsible food manufacturer, McCain Foods is committed to ensuring their products can be enjoyed as part of a healthy, balanced diet. A number of their best loved products do not contain any added salt such as Ready Baked Jackets and Naked Oven Chips. They also have an ongoing reformulation program and have reduced the amount of added salt in products by over 30% since 2001.

Reformulation and Healthier Options

MARS FOOD

MARS Food



At the start of 2021, Mars Food set out a new global ambition to deliver 5.5 billion healthy meals by 2025. They will also add 4 billion servings of vegetables, provide a 30% increase of fibre servings in our products, and an additional 5% reduction of sodium in their global portfolio by 2025. This will be supported by reformulation where necessary, in addition to new product innovation. For example, Mars Food UK recently launched Dolmio 7 Vegetables pasta sauce which contains two of your five a day in each serving.

KELLOGG'S

Kellogg's

Kellogg's is expanding its high fibre Wheats cereal range with the launch of three brand-new variants, including apricot, plain and blueberry. As part of its decade-long plan to improve its foods for consumers, the community and the planet, Kellogg's will be adding Apricot, Blueberry and Plain Wheats to its existing range of Frosted, Choco and Raisin Wheats.



All the new cereals are non-HFSS*, high in fibre, contain 74% or more whole-wheat and are low in fat and salt. The trio have been carefully developed at Kellogg's Manchester based factory, with the Apricot and Blueberry variants offering people just the right balance of flavour, with a crunchy whole-wheat shell encasing a smooth fruit flavoured filling.

Last year, the business also announced changes to its portfolio that would see four of its five biggest selling cereals become non-HFSS*.

*HFSS - Food and drink high in fat, sugars or salt, as defined by the Nutrient Profiling Model.

WEETABIX



Innovation is an important part of ensuring Weetabix are always offering consumers the most nutritious and delicious options. This year, they introduced tasty new products, such as Weetabix Melts; Oatibix Flakes Nutty Crunch; and a new range of Immune Support On The Go Drinks, with added vitamins and minerals that boost the immune system.

After four years of successful technical innovation, Weetabix reduced sugar across their portfolio by 16% to well below the industry average and voluntary targets set by Public Health England.**

Weetabix are currently working on a project that has identified a way to reduce sugar coatings by a further 20% and are also due to start a new project to look at further low sugar developments in breakfast cereals.

NESTLE



Good Food, Good Life



Sugar reduction is a key priority for Nestlé who recently reformulated their Nescafé coffee mixes, Coffee Mate and hot chocolates. The aim was to increase authenticity (made with naturally sourced ingredients), remove some additives and reduce sugars. Nescafé '2 in one' is sugar free and low fat when prepared, contains no hydrogenated vegetable oils, artificial flavours or sweeteners and contains 42 calories per mug.

Overall, this has resulted in the removal of over 850 tonnes (210 million teaspoons) of sugars, 7.5 tonnes of saturated fat and 3 billion calories. The sugar reductions have contributed to the sugar reduction in coffee mixes in Public Health England Reporting (2020).

** Public Health England has now transferred to the Office of Health Improvement and Disparities

NAKED JUICE



The sugars in all Naked products are naturally occurring sugars and not added. In Quarter 2 of 2020, Naked launched their Zing smoothies range which had an average of 8.9g sugars/100ml. The three new flavours, Mango, Tropical and Strawberry, contain 8.4g, 9.8g and 8.5g sugars/100ml, respectively. At the same time, Naked reformulated Green Machine and Mango Machine smoothies reducing the sugars from 11g and 9.6g sugars/100ml respectively before reformulation, to both products containing 8.6g sugars/100ml after reformulation. This achieved an 18kcal and 12kcal per serving reduction, respectively. Overall, the portfolio achieved a 11% reduction in SWA sugars/100g.

In Quarter 1 of 2020, Naked delisted Protein Pomegranate that contained 13g sugars/100ml. In Quarter 4 of 2020, Naked delisted their product with the highest level of sugars, Tropical Punch (14g sugars/100ml).

GOOD EARTH



Good Earth reformulated its Good Earth Kombucha range for 2021 to further boost flavour and reduce sugar content. The three Good Earth Kombucha flavours of Original; Blueberry & Raspberry; and Lemon and Ginger now have an average of 46% less sugar across the range and around 30 calories or less per 275ml bottle.

PREMIER FOODS



Paxo Low Salt Sage & Onion stuffing mix contains 70% less salt than a standard equivalent. The product mix can make 12 delicious stuffing balls or can be used as a topper to add flavour and texture to any dish. Great with pork chops, steak, fish or atop a vegetarian bake. The stuffing mix contains no artificial colours or preservatives and is suitable for vegans.



In early 2021 Premier Foods brought to market a reduced sugar version of their Mr Kipling Viennese Whirls. The reformulated Whirls contain 30% less sugar compared to the original Mr Kipling Viennese Whirls. They are also made with 100% natural flavours, include no artificial colours or hydrogenated fat and are suitable for vegetarians.

PRINCES GROUP



Princes Group has launched a dedicated plant-based brand to meet growing demand from consumers.

Plot9 has been developed to embrace tastes and textures of real vegetables in every product, exploring new and adventurous flavours and championing high quality ingredients for fabulous tasting, 100% vegan products.

As well as being one of your 5 a day, Plot 9 products are an excellent source of protein, with kcals per 260g pot ranging from only 206 to 320. In addition, each pot is low in fat at an average of 2.9g.

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
- > UK and devolved 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

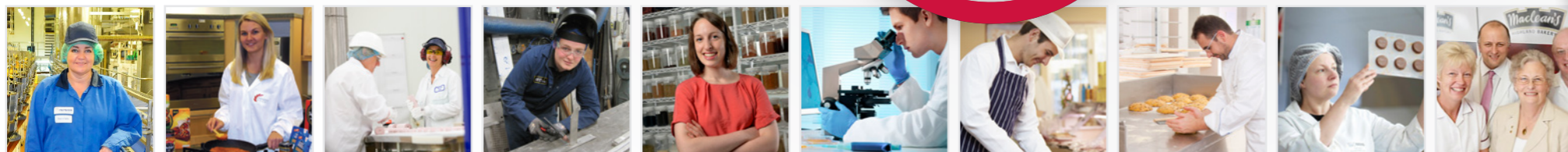
> Plant trials checklist:

- > 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



'Did You Know' Insights provided by:

leatherhead food research

New Product Development - Portion Sizes

Providing a range of portion size options is another key lever for manufacturers to support consumers in achieving a healthier diet. This is particularly useful for categories where reformulation is less feasible, due to the functional role of sugars, salt and/or fat in these products. Portion size is well-established as a mechanism to support a healthier balanced diet, and we would like to see this more widely recognised, endorsed and incentivised. We look forward to working closely with the Office of Health Improvement and Disparities to ensure portion size plays an integral role in all reformulation programmes, and that this is equally reflected and celebrated in monitoring and reporting. Food and drink manufacturers will also work with Government to find effective ways to raise consumer awareness of the important role of portion sizes as a means to reduce calorie intakes, as part of the Government's Better Health campaign and where possible through product marketing.

Expert View



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 the Office of Health Improvement and Disparities - 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 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.

Some countries include portion size information 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 has developed a set of resources on portion size as part of a healthy diet, called 'Find Your Balance'. These provide guidance on portion sizes for a range of foods using practical measures such as hands. The guides also suggest how often to eat foods from each of the main food groups to get the right balance. Portion size is a growing priority for public health and one where the food industry can be an integral part of the solution.

The British Nutrition Foundation is a registered charity that delivers evidence-based information on food and nutrition to support healthy, sustainable diets.

FERRERO

FERRERO



Ferrero care about the responsible consumption of their products and, in line with their global nutritional principles, believe everyone can enjoy their products in moderation. Small portions help people to enjoy their favourite treats as part of a balanced and varied diet. Ferrero know this approach is important and that is why over 93% of their products come in portions of less than 150 kcal.

Ferrero aim to help consumers make informed choices and always endeavour to communicate responsibly. They have clear nutritional information on pack and in the UK, Nutella jars feature a sticker on the lid which visually represents the recommended portion size (15g) as one heaped teaspoon. 89% of consumers agreed that the visual depiction was helpful to understand the right portion.

WALKERS



Quavers and Wotsits - have under 100 calories each.

88% of Walkers' single-serve sales are 135 calories or less. And this year PepsiCo launched a campaign to help consumers make informed choices, by letting them know that multipack bags of household favourites - such as



MONDELÉZ INTERNATIONAL



Mondelēz International is continuing its strong track record of offering more portion control options for consumers by voluntarily committing to bring all its Cadbury chocolate bars sold as part of a multipack under 200 calories by the end of 2021. The move will see 10 billion calories removed from the UK market every year.

It is part of Mondelēz International's ongoing commitment to help tackle obesity and builds upon the company's pledge to bring all its Cadbury chocolate and wider biscuit products typically bought by parents for children under 100 calories by the end of 2020. The much loved Cadbury bars, Fudge, Curly Wurly and Chomp, as well as Barny sponge bears and Cadbury Mini Fingers and Cadbury Animals are now all under 100 calories.

SNACK A JACKS



PepsiCo's Snack A Jacks have undergone a brand and recipe refresh. Across the whole range, the snack products will now have zero red traffic lights and come at less than 100 calories per pack with no artificial colours or preservatives. As a result of reducing sugar and salt in the recipe, three flavours will become non-HFSS.



Supporting innovation across the UK



FDF Scotland - Reformulation for Health



The FDF Scotland's Reformulation for Health Programme, funded by the Scottish Government, was launched in January 2019 as an action from the Scottish Government's A Healthier Future; diet and healthy weight delivery plan to "support food and drink SMEs across Scotland to make their products and recipes healthier to help tackle obesity and poor dietary health".

The work of the Reformulation for Health Programme is transforming the way we produce food and drink in Scotland. Since our launch in 2019, we have engaged and supported hundreds of SME food businesses to reformulate Scotland's everyday food, cutting fat, sugar and salt and improving nutritional content. In our drive for healthier food we have involved the whole food system – from suppliers to retailers and caterers.

DELIVERING CHANGE: Innovative initiatives

A range of practical initiatives have been developed to support businesses across Scotland to reformulate, targeting those who can make a real difference.

Working in partnership

- ✓ Our Reformul8 Regional Programme works with Local Authority Environmental Health Officers and Scotland Food & Drink Regional Food Groups to improve dietary health in communities across Scotland.
- ✓ Over 30 businesses have signed up to support reformulation through our Reformul8 Partnership including ingredients manufacturers, food manufacturers, contract caterers, and others who can assist with relevant research and training.

Support for business

- ✓ Our Reformul8 Challenge Fund assists with the associated costs of reformulation, including trialling recipe and process changes, improving production capacity and accessing nutritional testing and technical support.
- ✓ Our user-friendly Reformul8 Advice Tool generates sector-specific advice to help producers use health as a business driver.
- ✓ We provide training and up-skilling through webinars, podcasts and one-to-one advice.

MACSWEEN



MacSween of Edinburgh received £2,500 from the Reformul8 Challenge Fund to reformulate its core branded products of haggis, vegetarian haggis and black pudding and to explore reformulation options for their white label ranges for retailers. The aim is to bring salt and fat levels in line with front-of-pack amber labelling. Trials have reduced fat content in Macsween haggis by approximately 25%.

ARRAN DAIRIES



Arran Dairies received £1,500 from the Reformul8 Challenge Fund, along with bespoke support, to reformulate its base ice cream recipe. They are working to remove 2,730kg of saturated fat and 4,430kg of sugar per annum (based on estimated sales), in addition to 42 million calories.



FDF Wales- Project Hexagon background



The bakery sector in Wales is the second largest employer within the Welsh food & drink manufacturing market, with approximately 180 businesses and worth £283m to the country's economy.

In response to directives such as the Welsh Government's Well-being for Future Generations Act and Food and Drink Action Plan, Project Hexagon was born. Funded by a Welsh Government collaborative project, it aims to support the bakery sector by introducing innovative raw materials into their products to make them healthier.

Project Hexagon brings together a consortium of private sector bakery companies to work alongside new product development experts at ZERO2FIVE Food Industry Centre and global ingredients experts Univar.

The Welsh Government has supported the programme throughout with regular networking events for participants featuring a diverse range of speakers who inspire innovation and offer advice.

LA CRÈME PATISSERIE



La Crème Patisserie worked with Univar and ZERO2FIVE to develop a vegan setting agent solution for use in their range of cheesecakes, mousses and panna cottas. The solution involved two innovative plant-based stabilisers and thickening agents. This allowed for varying levels of firmness to suit the needs of different desserts and give the desired performance.

Sian Hindle, of La Crème Patisserie said, "It's been fantastic to call on the technical expertise of ZERO2FIVE and work with an ingredient manufacturer who I would never normally have access to. This has allowed me to create innovative products that my customers are increasingly demanding which I hope will result in increased sales and markets."

THE BAKE SHED



The Bake Shed wanted to develop a solution to make their gluten free luxury caramel shortbread less crumbly. With the assistance of Univar and ZERO2FIVE, the recipe was successfully reformulated to incorporate a plant-based protein concentrate and give the product an improved texture.

Will Rhys-Davies, Owner of The Bake Shed said, "Project Hexagon has given us access to a significantly greater level of expertise than we have in-house. This allowed us to complete the project to a very efficient timescale and to improve the quality of our gluten free shortcake so it aligns with our gluten containing product."

33 businesses supported to make healthier products through the Reformul8 Challenge Fund

640 businesses targeted by Reformul8 Regional programme – improving dietary health in communities nationwide

9 student placements developing innovative ideas for a healthier future

32 local authorities engaging in improving community health

109 million fewer calories in Macaroni cheese recipe

20% salt reduction in trial haggis recipes

Supporting our Communities



Our companies have long histories of supporting communities, whether that's funding sport, helping local education initiatives or providing food to those that need it. The COVID-19 pandemic has exacerbated the stark inequalities in our society, and in particular the growing numbers in our society living with food insecurity. Our members, working with partner organisations, are helping to provide the support so many need. As a sector with businesses in every constituency, we believe food and drink manufacturers can play a key role in supporting Government initiatives in this space. Food and drink manufacturers will seek to work closely with Government as a valuable partner in the delivery of initiatives to support the wider Levelling Up Agenda, as well as to explore ways that food manufacturers can support the further role out of new health incentive approaches, such as those recently developed by Sir Keith Mills.

Expert View

FareShare - the role of community initiatives



FareShare believes no good food should go to waste. We take good quality unsold surplus from the food industry and redistribute it to vulnerable families and individuals across the UK, through a network of thousands of charities and community groups.

Being honoured with the FDF's 2021 Community Partner Award was recognition not just for FareShare but also for the vital work of this whole network of communities that support each other.

Five million people live in food insecure households in the UK⁹, with that rising to an estimated 7 million during the pandemic¹⁰. The charities and organisations which rely on FareShare's redistributed surplus food, offer vital

year-round support and lifelines. They are often working in deprived or isolated communities.

Our redistributed surplus food helps combat hunger, and reduces any environmental impact, by not letting it go to waste. During the pandemic, between April 2020 to March 2021, we redistributed the equivalent of 132 million meals – 4 meals every second.

But the charities and community groups which rely on our food, are also providing advice and support with the underlying causes of food poverty, including unemployment and low income, housing issues and homelessness, mental health issues, addiction, isolation and loneliness.

9 - Department for Work and Pensions (2021). Households Below Average Income, 2019/20, London. Available at: <https://www.gov.uk/government/collections/households-below-average-income-hbai--2>

10 - The Food Foundation (2021). A crisis within a crisis: The impact of Covid-19 on household food insecurity, London. Available at: <https://foodfoundation.org.uk/publication/crisis-within-crisis-impact-covid-19-household-food-security>

MCCAIN



McCain have pledged to donate £1 million to Family Fund by 2023 to help the charity reach its goal of providing 150,000 grants and services to UK families with disabled and seriously ill children. The grants will enable families to purchase essential items critical to easing the strain of their day-to-day lives, from kitchen appliances to technology such as tablets and computers. The items will allow the families to spend more time together, such as during mealtimes. Alongside the pledge, McCain is also using its platforms to drive greater awareness of Family Fund and give a voice to its work. They have released a limited-edition pack design for its best-selling product, Home Chips, and launched a national primetime advertising campaign focused on the partnership.



MARS FOOD



Mars Food UK are partnering with anti-poverty charity the Trussell Trust to Stand Against Hunger for the third year in a row. The campaign across Ben's Original and Dolmio brands is aimed at raising awareness of the Trussell Trust's work to support people facing hardship and has so far reached over 30 million people letting them know how they can help end the need for food banks in the UK.



SBF GB&I



Further embracing their Growing for Good vision, SBF GB&I have also worked to get the nation moving more. This has included providing over 10,000 disadvantaged 16-24-year olds with access to sport and development opportunities through 'B Active' programmes, and inspiring over 1.5 million people to be more active through Lucozade Sport's three year 'Made to Move' campaign fronted by Anthony Joshua.

WEETABIX



Weetabix's flagship partnership with the FA encourages people to Eat Well, Play Well and Live Well. It gives young girls the chance to build confidence, make friends and get active through football. The company supports 2,000 Weetabix Wildcats and Huddle providers in England and Wales, who help 40,000 girls play in local communities across the UK.

Weetabix has supported campaigning causes including Marcus Rashford's Food Poverty Taskforce and Magic Breakfast's School Breakfasts Bill. Through its partners FareShare and Magic Breakfast, the company has donated five million breakfasts in the past year and aims to donate to this level this year.

In Christmas 2020, Weetabix also delivered 2,000 festive meals to people suffering from food poverty in Northampton on Christmas Eve with the charity Food4Heroes.

Supporting our Communities

KELLOGG'S



Back in 1998, Kellogg's responded to the UK Government's extended schools programme by supporting schools with training, funding and supplies for the introduction of breakfast clubs.



Over the last 24 years Kellogg's has invested over £5 million and today, Kellogg's is the largest corporate backer of school breakfast clubs, supporting more than 4,000 clubs across Britain. As well as providing grants to schools, Kellogg's is also working with the charity Magic Breakfast to ensure all the schools they support are offered Kellogg's Corn Flakes and Rice Krispies in the morning. This will feed 170,000 children in 1000 schools. Kellogg's is also a founding member of England International footballer Marcus Rashford's 'Child Food Poverty Taskforce' and continues to support communities with food donations via charities such as FareShare.

MONDELÉZ INTERNATIONAL



Funded by Mondelēz International and delivered by The Conservation Volunteers (TCV), the community Green Gym is located at Rowheath Pavilion. It offers locals the opportunity to take part in free outdoor sessions where they can be active and get involved in growing fruit and vegetables.



The Health for Life programme encourages people of all ages and abilities to take part and is designed to inspire a healthier lifestyle, motivating participants to increase physical exercise, learn more about healthy eating and how to grow their own fresh produce whether in a community space or at home. The Green Gym offers

social interaction and hands-on horticultural activity in the natural environment, benefitting the health and wellbeing of those taking part. As with any gym, each session starts with a warm-up in preparation for a range of activities.

The multi-functional space at Rowheath also includes a large growing area where locals can plant and harvest their own choices of fruits and vegetables. The on-site Rowheath Pavilion café will also be using the freshly grown produce in a variety of dishes for diners to enjoy.

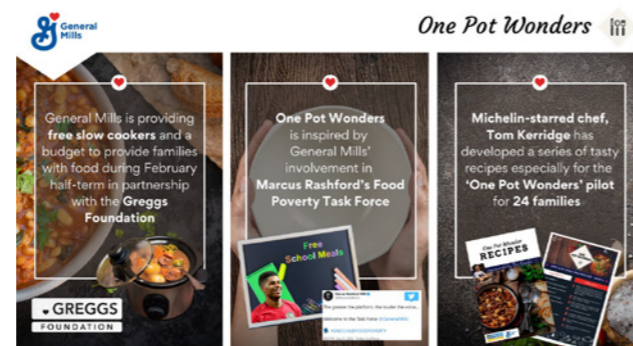
GENERAL MILLS



In February 2021, General Mills, inspired by their involvement in Marcus Rashford's Child Food Poverty Task Force in 2020, launched its 'One Pot Wonder' pilot with celebrity chef Tom Kerridge and Greggs Foundation. The campaign provided slow cookers (and food boxes) to families during the February half-term holiday.

Michelin-starred chef, Tom Kerridge, developed a series of six healthy and easy-to-make recipes to accompany the slow cookers and help families prepare tasty meals. The recipe book includes delicious staples such as bean chili and winter warmers like stews.

The pilot is aimed at helping reduce child food poverty in the UK and will act as an extension of General Mill's partnership with Greggs Foundation through their Breakfast Club programme which, during term time, provide nutritious breakfasts to schoolchildren across the country.



Sustainable healthy diets

FDF members support the aim to ensure the food made, bought and consumed is healthier and better for the planet. We are committed to supporting our members with this goal, including guidance to help companies on the road to Net Zero. However, this is a complex issue. Many foods with low greenhouse gas emissions have low nutrient density and vice versa¹¹ It is essential Government and industry work in partnership to develop effective and appropriate metrics that support the measurement of progress towards sustainable healthy diets. Once metrics are developed, communicating this to consumers will be a key priority.

Expert View

Emma Piercy

The Food and Drink Federation, Head of Climate Change and Energy Policy



Planning for Net Zero

Food systems contribute around 25 to 30% of global greenhouse gas emissions – the great challenge is now both in responding to the causes and consequences of climate change on food production to build and maintain sustainable resilient food systems for current and future generations.

In April 2021, the FDF announced its Net Zero by 2040 Ambition for the UK's food and drink manufacturing sector. This is aligned to ambitions from across the supply chain, including those of the National Farmers' Union and British Retail Consortium.

COP26 was a springboard to building momentum on

coordinated actions across the farm-to-fork supply chain, helping the sector to reduce its carbon footprint on the pathway to Net Zero. This includes the FDF's Net Zero Handbook¹², which highlights key actions in each part of the supply chain, of the many practical measure companies can start implementing without delay.

The largest source of the sector's emissions is the production of raw ingredients (around 66% of food consumed in the UK) with recommendations around understanding ingredient emissions, procuring lower carbon ingredients and incorporating carbon targets into product reformulations. Customers and consumers are also increasingly demanding lower carbon products and the sector is leading on better data provision.



11 - Drewnowski et al (2015) Energy and nutrient density of foods in relation to their carbon footprint
12 - FDF's Net Zero Handbook - available at <https://www.fdf.org.uk/fdf/resources/publications/guidance/net-zero-roadmap/>

Sustainable healthy diets

PEPSICO



In January 2021, PepsiCo and Beyond Meat launched The PLANeT Partnership. The two companies will develop snacks and beverages made from plant-based protein – bringing together Beyond Meat’s innovation expertise with PepsiCo’s marketing and commercial capabilities to make products that are better for the planet.

PREMIER FOODS



Each year, as part of their ESG strategy, Loyd Grossman aim to introduce one new range of products that enables consumers to improve their diet by eating more vegetables, protein or fibre, or delivering products that are fortified for greater nutrition.

Loyd Grossman Healthy Inspirations range was designed to help these shoppers replacing their favourite Bolognese meal with a delicious meat-free alternative. Our delicious sauces contain lentils and quinoa (rich in fibre), that also give the meal a great texture and bite, and therefore do not require adding any meat. These are easy swaps for our consumers, which also help reducing their environmental impact.

NESTLE



Good Food, Good Life



In June 2021, Nestlé launched Wunda Original and Unsweetened into the UK market. Wunda is a delicious plant-based milk alternative made with pea protein. It is high in protein and fibre and low in fat and sugar. Wunda provides a source of vitamins D, B2, B12 and calcium. Both products score green on the traffic light for the front of pack labelling criteria, in addition to being non-HFSS, making it a Wunda-ful choice as a milk alternative.

SBF GB&I



Warmer winters could threaten blackcurrants growing in the UK, as a prolonged period of ‘winter chill’ is required in order to produce delicious and juicy berries. That’s why more than twenty years ago, SBF GB&I along with leading agricultural experts at The James Hutton Institute, set out to develop and breed climate-resilient blackcurrants that are fit for the future.

SBF GB&I has invested over £10m in its blackcurrant breeding programme so far and in 2020, the business was proud to see its latest research project bear fruit. Named after a Scottish mountain, the new Ben Lawers blackcurrant variety delivers the same great taste but importantly requires significantly less winter chill time than other varieties.

This scientific breakthrough has a huge potential impact across the entire food and drink industry, informing how other crops such as blueberries, cherries, apples and plums can withstand the effects of climate change too.

PAXO



Paxo Veggie Fillers are a fantastic way to turn simple vegetables into something special. From stuffing for potatoes, peppers, mushrooms, aubergines or courgettes, the delicious blend of focaccia breadcrumbs, sundried tomato & oregano in Paxo Veggie Fillers guarantees tasty results every time. The products are a source of fibre and are low in fat, saturated fats and sugar. They also contain no artificial ingredients and are suitable for vegetarians and vegans alike.

Our industry at a glance

Manufactured food and drink contributed almost **£30bn** to the economy



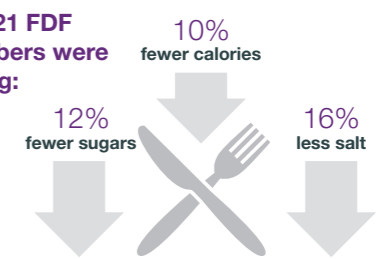
In 2021, total domestic sales of manufactured food and drink reached nearly **£100bn**



In 2021 the food & drink industry was the **biggest manufacturing sector in the country by turnover...**

...larger than automotive & aerospace combined

In 2021 FDF members were selling:



...than they were in 2017

In 2021, UK food & drink exports exceeded



In 2021 our top three export markets were

Ireland, France & the USA

The food supply chain employed **4.2 million** people in 2021 & generated over **£120 bn** of added value for the economy

In 2021 our industry employed over

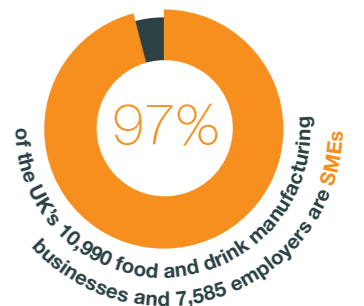
463,000 people



across every region and nation of the UK

In 2021 our industry had a turnover of

£112bn, accounting for over **22%** of total UK manufacturing



FDF members reported an **absolute reduction of 58%** in CO₂ emissions

from their use of energy in manufacturing operations in 2020, compared to the 1990 baseline



Over half of our members identified **investment in new product launches and increased demand for healthy food products** as opportunities for 2021

The food and drink manufacturing sector delivered a **reduction in food waste** of over

30% on a per capita basis since 2011





About the FDF

The FDF is a powerful voice for the UK's vibrant, resilient and diverse food and drink manufacturing industry. For over 100 years, we have successfully contributed to policy making and legislative development, championing our members' views – large and small – on the critical issues of the day.

We bring together business, government and stakeholders to ensure our manufacturers have the right conditions to grow, invest and employ, while continuing to produce high quality, nutritious and affordable food and drink. With more than 1,000 members – from the most recognisable global brands to the most innovative start-ups – we represent the largest manufacturing sector in the country.

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