



Estonian Food Industry Association Conference

GETTING ESTONIA INTO SHAPE
"HOW CAN INDUSTRY HELP?"

***Best practices in Europe: The
example of the soft drinks
industry***

***Sigrid Ligné, Director General
Tallinn, 14 March 2017***

UNESDA

Soft Drinks Europe



EU Platform on Diet,
Physical Activity and Health

- In Brussels since 1958
- Grouping 22 national beverage associations and 10 direct corporate members representing 80% of the European market
- Representing non-alcoholic beverages
 - Including still drinks, cordials, dilutables, carbonates, fruit based drinks, ice teas and coffees, squashes, energy drinks and sports drinks
 - Excluding bottled water, juices & nectars, milk-based and hot beverages
- Member of the EU Platform for action on Diet Physical Activity and Health since 2006
 - Active EU & sector wide commitments in core areas of action
 - Using third party monitoring to assess membership compliance & consumer impact

1. EU and sector wide actions on specific populations & settings

Schools & marketing to children

Core areas of actions

Compliance

Impact

1. No advertising of any soft drinks to children under 12 in any media

Print, online & social media

100% *1

TV

99% *1

Company owned websites

95% *1

Contributing to reducing exposure by 88%

2005-2014 *2

2. No presence in primary schools

- No sales
- No commercial activity
- No advertising & marketing

95% *3

Soft drink free environment

3. Responsible behaviour in secondary schools

Unbranded vending machines

84% *3

Mix of drinks incl. no sugar varieties, water and juices

98% *3

Parents & teachers involved

84% *3

The presence of sugar sweetened beverages has decreased by an average of



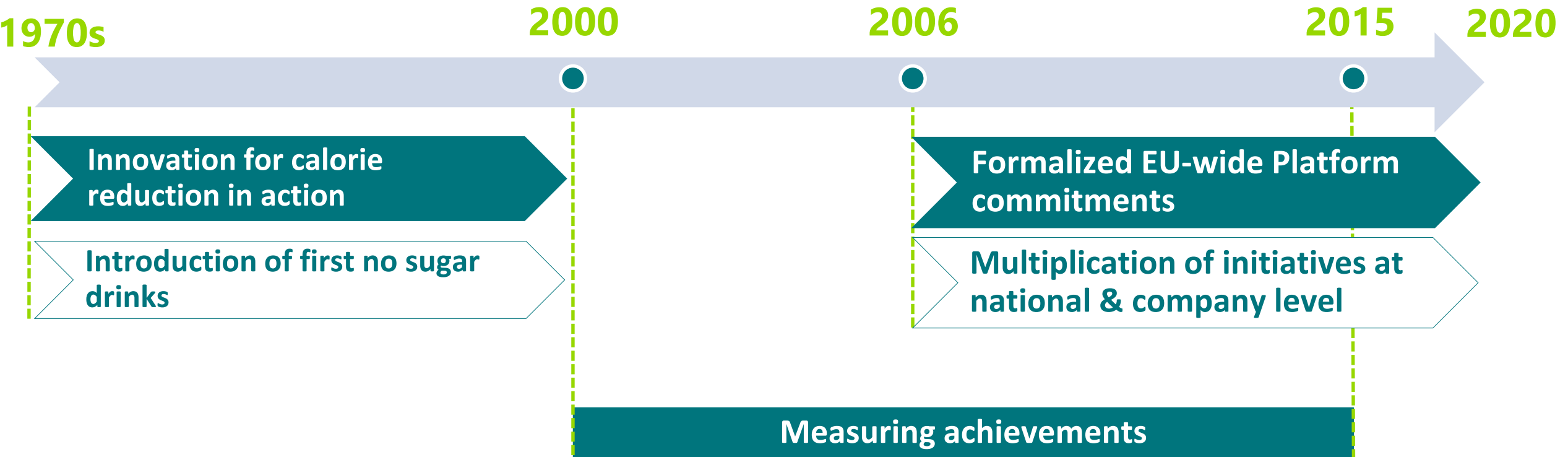
Sources: *1. Xtreme Information, 2012

*2. EU Pledge, 2014 Monitoring report

*3. PriceWaterhouseCooper, 2010 & 2015

2. EU-wide actions on calorie/sugar reduction & achievements so far (2000-2015)

Over 40 years of actions for calorie & sugar reduction



Core beliefs & parameters (1)

- **Supporting cost-effective interventions to combat obesity (Mc Kinsey Global institute, 2014)**
 - Portion control and Reformulation: Top 2 most cost effective interventions
 - Tax on high fat/sugar products: Ranks 13 out of 16 interventions
- **Supporting coordinated action at EU level in partnership with all stakeholders to ensure critical mass & a level playing field**

Core beliefs & parameters (2)

- Recognizing that to help address overweight and obesity as risk factors for NCDs, a reduction in overall calorie consumption is needed, including sugars from soft drinks
- In soft drinks, reductions in added sugars directly lead to reduced calories
- Taking into consideration early movers' efforts and the diversity of diets and consumption patterns across the EU

Active commitments & third party monitoring



EU Platform on Diet,
Physical Activity and Health

EU Platform commitments

To promote portion control:

Increase availability of smaller packaging sizes

To offer choice:

Increase availability of no/low calorie beverages



Measuring achievements

Source: Canadean, 2014/16

Availability of
pack sizes smaller
than 330ml

+150%

2000-2013

Now

30

different single serve packs in a
variety of packaging options
<330ml

66%

of product introductions are
no/low calorie drinks

No/low calorie
varieties now

over **30%**

of sales in several
EU markets

Impact of our actions on calorie & sugar reduction

- Multiplication of initiatives at national and company level over past 10 years tailored to the local context
- Many of which in cooperation with governments in the context of industry-wide discussions
- All industry actions combined resulted in a **12%** decrease in average calorie/sugar content of soft drinks in Europe **between 2000-2015** (Canadean, 2016)

3. EU added sugars reduction & food improvement agenda: an opportunity to accelerate efforts across Europe

Launch of coordinated discussions at EU level: National plans expected by the end 2017



January 2016, High Level Group on Nutrition: Launch of an EU added sugars reduction framework

ANNEX II: ADDED SUGARS

EU FRAMEWORK FOR NATIONAL INITIATIVES ON SELECTED NUTRIENTS

On the basis of the relevant experience in Member States that have national plans, it is proposed to set a general benchmark for added sugars **reduction of a minimum of 10% by 2020** in food products against the Member State baseline levels at the end of 2015 **or to move towards 'best in class' levels.**⁷

17 June 2016, Council Conclusions, Food improvement: « *Call on Member States to confirm national plans for food improvement by the end of 2017 in cooperation with stakeholders* »



Council of the
European Union



4. Our ambition moving forward: Accelerate speed and scale of added sugars reduction (2015-2020)

Our objectives & ambition

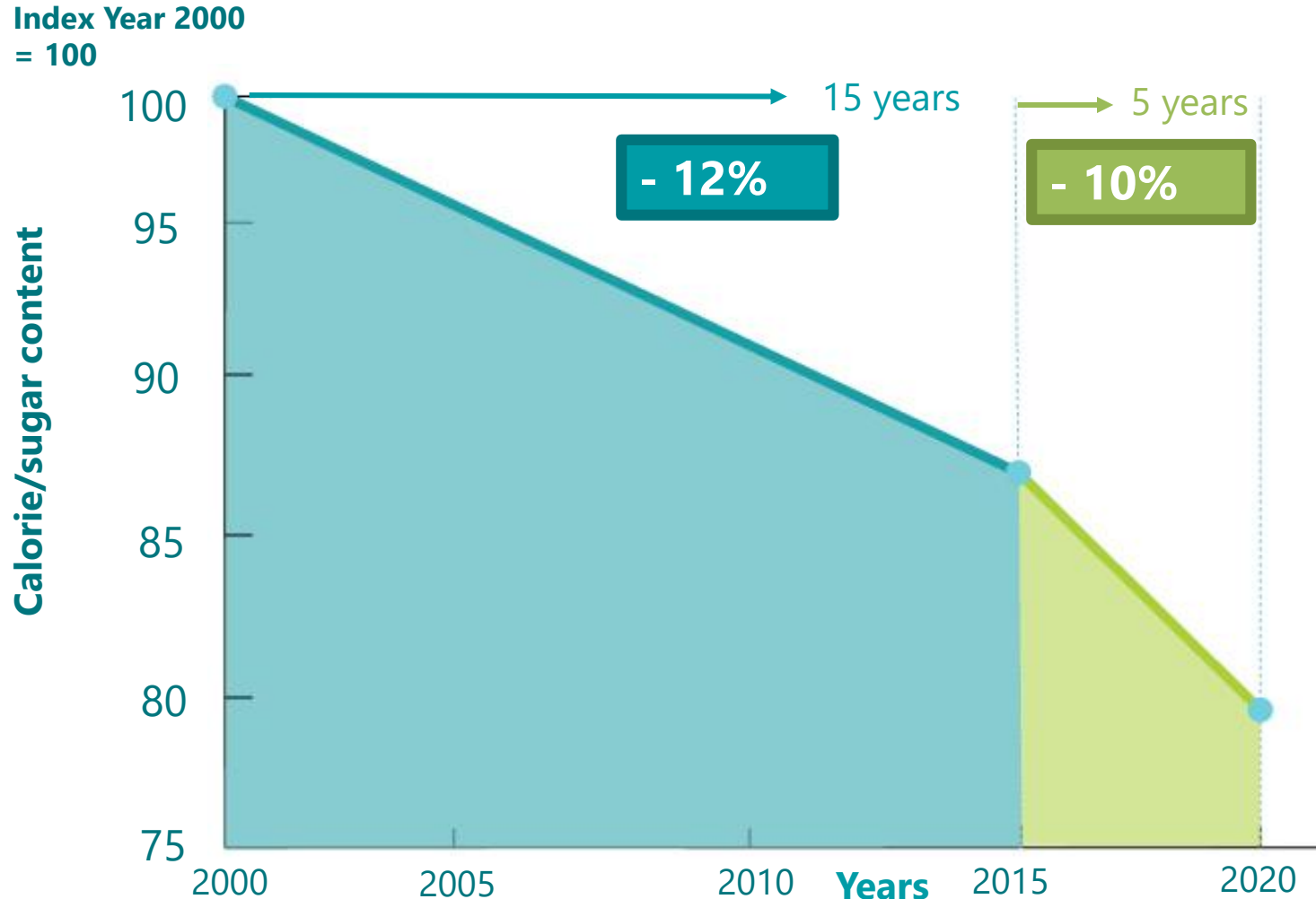
- **2000-2015: We have reduced calories/sugars by 12%**
- **2015-2020: Accelerating added sugars reduction in soft drinks across Europe**

Proposing a **specific, forward looking and measurable framework ambition at EU level**

UNESDA framework agreement to bring speed & scale to added sugars reductions in soft drinks across Europe

- **At European level, we commit to**
 - A further 10% average reduction by 2020 versus 2015 baseline
 - Monitor the aggregated achievement in 2020 versus 2015 baseline
- **At national level & across Europe, we commit to**
 - Take part in government-led voluntary reformulation initiatives
 - Combining all available tools to optimize reductions
 - Tailoring our efforts to suit local diets and consumptions trends

Accelerate reduction of added sugars: Tripling the pace between 2015 & 2020 (vs 2000-2015)




2000-2015 =
12% average reduction
(Canadean, 2016)

2015-2020 = Aggregate
European target to reduce
by a further 10% and
answer the EU calls on the
reduction of Added
Sugars & on food product
improvement

Innovation and sugar reduction in action: key levers & tools

INTRODUCING SMALLER PACK SIZES

Average **330ml** can of regular carbonated soft drink = 36g sugar

 **250ml** = 27.5g sugar
- **23.6%**

 **200ml** = 22g sugar
- **38.8%**

 **150ml** = 16.5g sugar
- **54%**

REFORMULATING EXISTING DRINKS

 Now at least
30% less sugar
in a.o DE, FR, RO, BG, CZ, PL,
NL, HR, CY, EL, IT

 Now **35% less sugar**
PT, IT, UK

 Now **45% less added sugar**

 Now at least
30% less sugar
in a.o UK, ES

 Now **10% less added sugar**

 Now at least
30% less sugar
in a.o PL, AT, FI, UK, FR, BE, IE,
NL, CY, EL

 Now **15% less added sugar**

INTRODUCING PRODUCTS REDUCED IN SUGAR OR WITH NO SUGAR AT ALL

 **No added sugar**
FR, BE, CH, NL


 **No added sugar**
FR, BE

 **Pepsi Next**
30% less sugar

 **Coca-Cola Zero**
no sugar, no calories

 **No sugar**
FR, BE, CH

 **Pepsi Max**
no sugar, no calories

 **40% less sugar**
FR

 **30% less sugar**
FR, BE

 **Coca-Cola Life**
at least 30% less sugar

PROMOTING DRINKS REDUCED IN SUGAR OR WITH NO SUGAR



The **UK's** leading companies increased their collective advertising spend on low and no calorie drinks by **49% in 2014**



In **Germany**, between 2010 and 2014, Coca-Cola **increased by 40%** the marketing & advertising spends for low/no calorie drinks



In **Italy**, between 2014 and 2016, **SBFE advertising spends on low/no calorie drinks increased by 70%**



42% of soft drinks sold in **Norway** are no or low sugar, containing less than 20kcal per 100 ml

External monitoring to measure aggregated achievement at European level

- Using independent external market research e.g. Canadean
- Based on the sales-weighted average sugar/calorie content
- Using sales data and sugar/calorie information provided on labels
- To be shared with stakeholders

Collaboration & partnership: key success factors

- UNESDA selected by the Maltese EU Presidency to present this initiative at an event on reformulation and product improvement with Member States, WHO, JRC and NGOs
- Praised by the European Commission & a number of EU stakeholders
- We look forward to working with the upcoming Estonian EU Presidency

**“Coming together is a beginning.
Keeping together is progress.
Working together is success.”**

Henry Ford (1863-1947)

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