Public Health England

Protecting and improving the nation's health

PHE Sugar reduction programme

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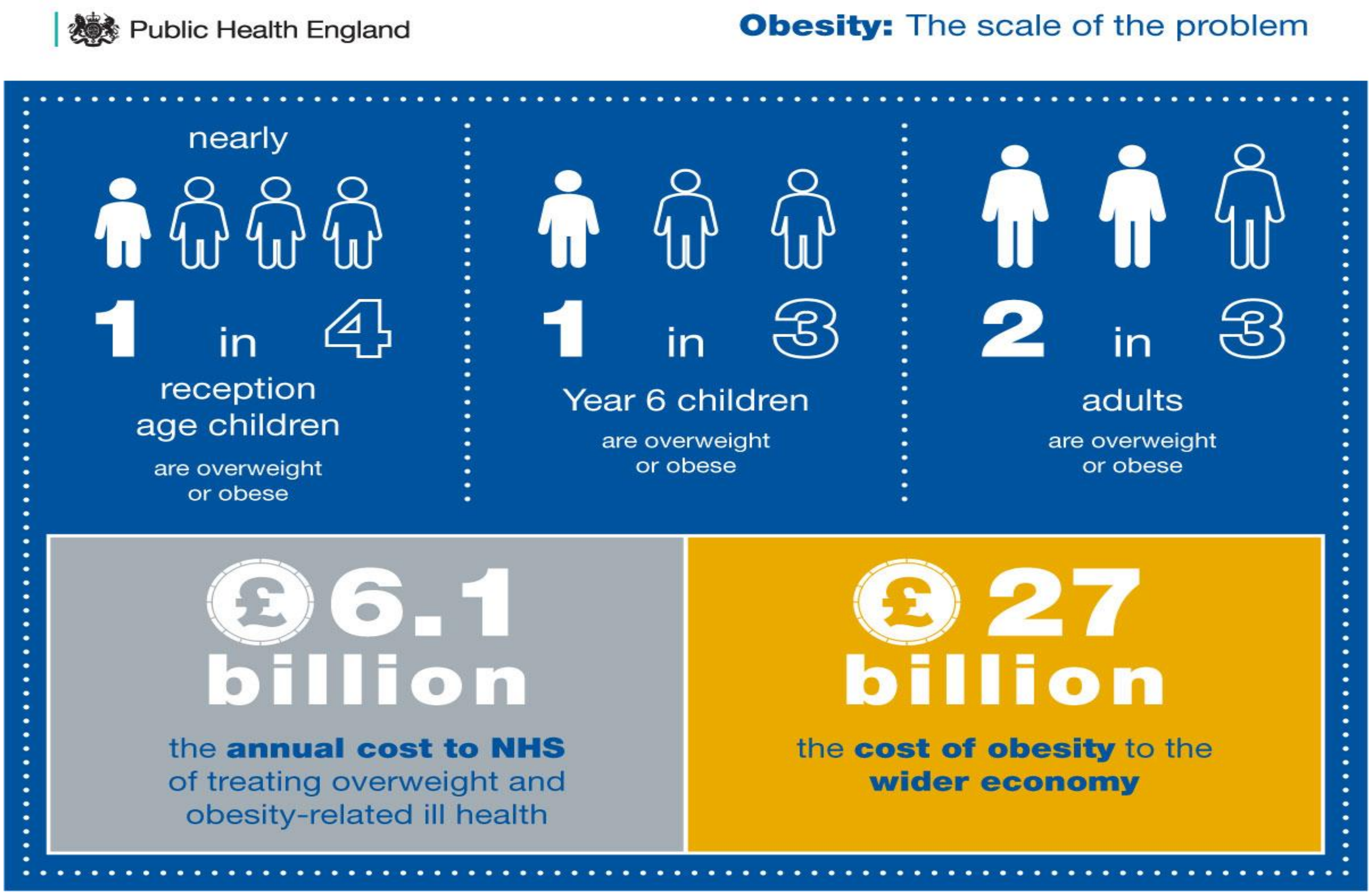
Best Practice Market Place - **20th June 2019**

Child overweight and obesity



UK diet compared with recommendations

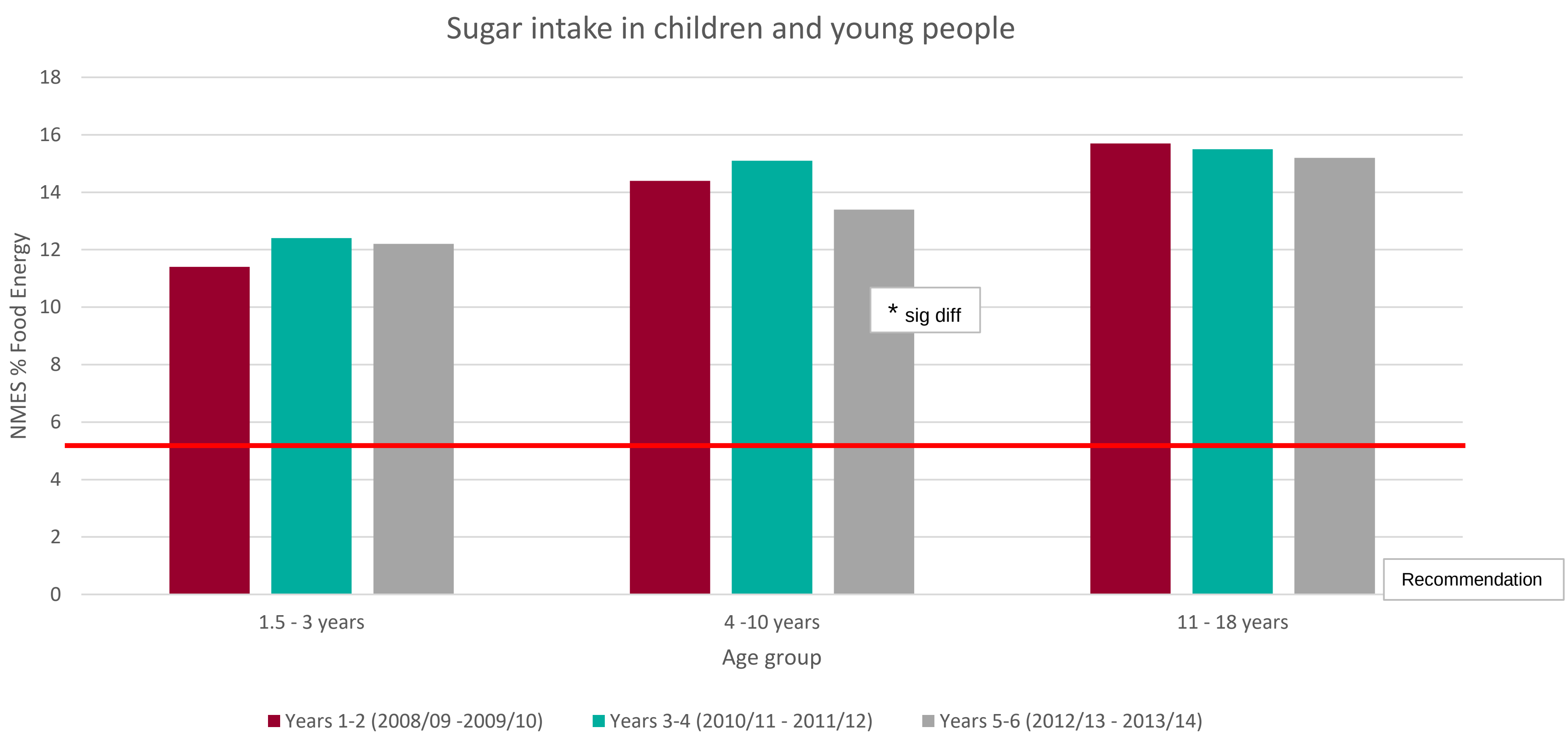
Nutrient (% food energy)	Target	Children 4-10 yrs	Teenagers 11-18 yrs	Adults 19-64 yrs
Total fat	≤35%	33.4	33.6	34.2
Saturated fat	≤11%	13.3	12.6	12.7
Trans fat	≤2%	0.5	0.5	0.5
Total carbohydrate	≥50%	51.7	51.2	48.5
Sugars (free sugars)	≤5%	13.4 (NMES)	15.2 (NMES)	12.3 (NMES)
Fibre (AOAC) (g/day) *	≥15-20g ≥25-30g ≥30g	*≈ 14* *(Est. from NSP)*	*≈ 16* *(Est. from NSP)*	*≈18* *(Est. from NSP)*
Salt (g/day)	≤3-5g ≤6g	4.6	6.6	8

≥ = more than or equal to; ≤ = less than or equal to
Non milk extrinsic sugars including added sugars and sugars released from cell structures eg. fruit juice

- AOAC equivalent estimated from NSP

Sources: National Diet and Nutrition Survey (NDNS) years 5 & 6 (2012/13-2013/14)
Salt intakes: adults: NDNS: salt intakes in adults 19-64 years in England 2014; children: NDNS: years 1-4 (2008/09-2011/12)

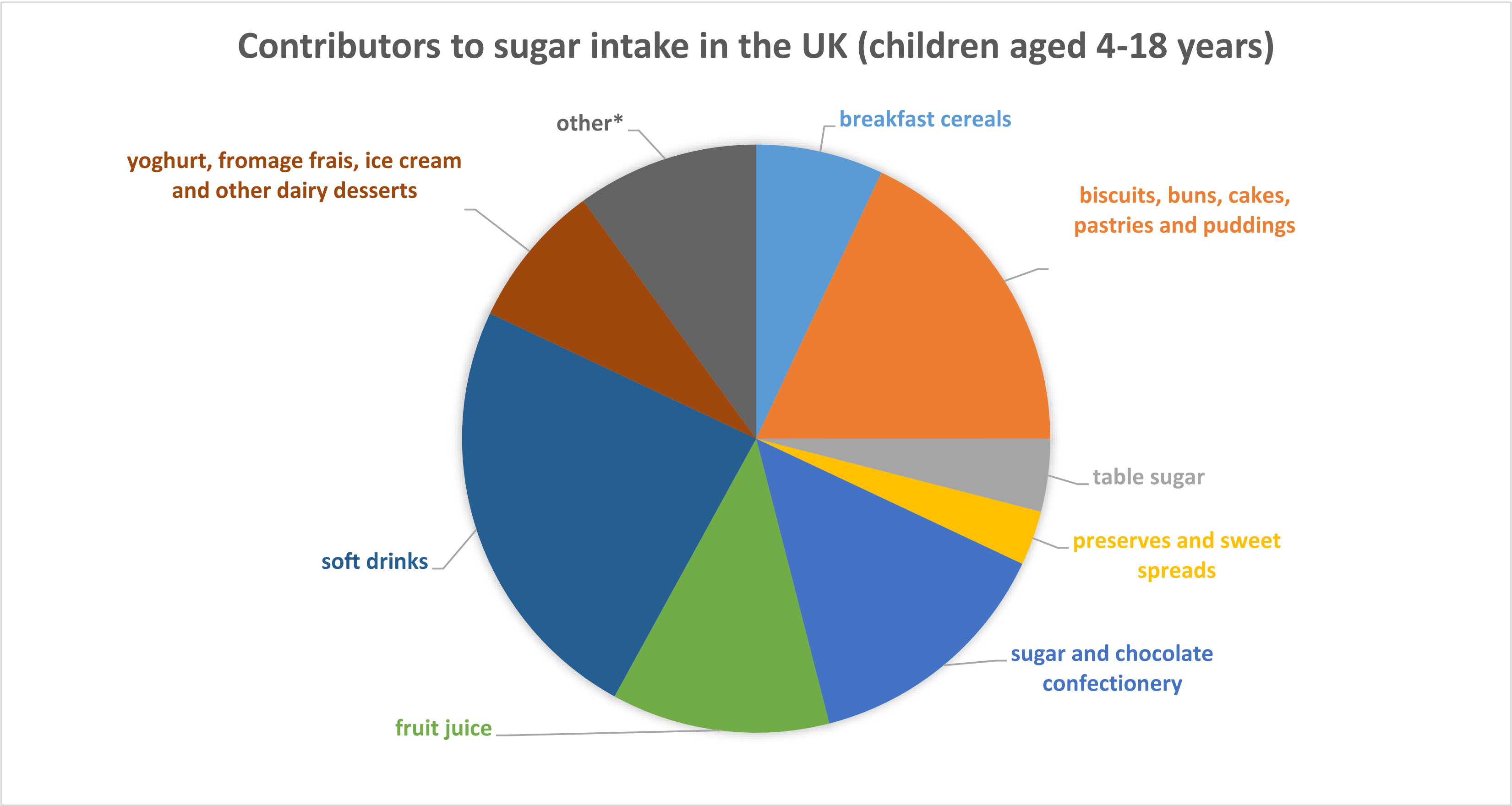
Trends in Children's Sugar Intake



Sugar intakes are for non milk extrinsic sugars including added sugars and sugars released from cell structure e.g. fruit juice. These figures will be similar to free sugars.

Source: National Diet and Nutrition Survey (NDNS) years 5 & 6 (2012/13-2013/14)

Which products?



This programme is about foods consumed by all children under 18 years including the very young- it encompasses family foods and those foods specifically marketed at these age groups

Scientific Advisory Committee on Nutrition's Carbohydrate and Health report

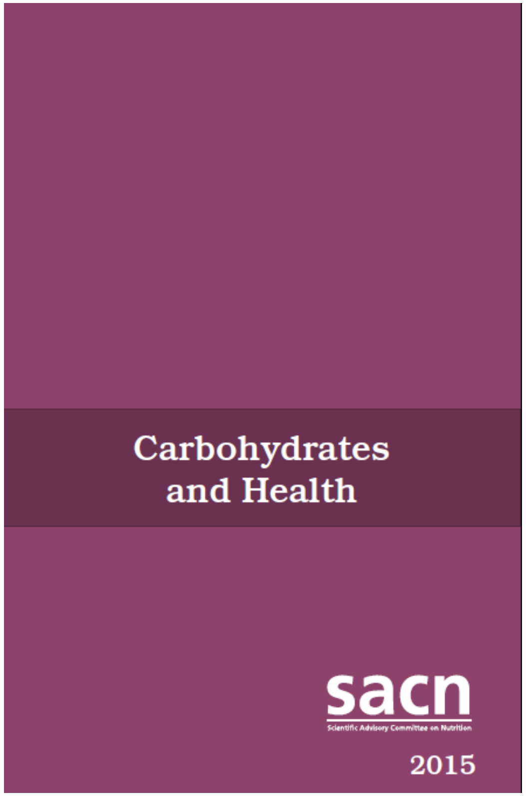
Published July 2015

Key findings:

- Sugar consumption increases energy intake
- Sugar consumption is associated with increased risk of tooth decay
- Sugar sweetened beverages associated with increased risk of type 2 diabetes and linked to higher BMI

Recommendations:

- A definition for 'free sugars' should be adopted in the UK.
- The Dietary Reference Value for free sugars should be set at a population average of around **5%** dietary energy for age groups from 2 years upwards.
- Consumption of sugar-sweetened beverages, by children and adults, should be minimised.



https://www.gov.uk/government/publications/sacn-carbohydrates-and-health-report

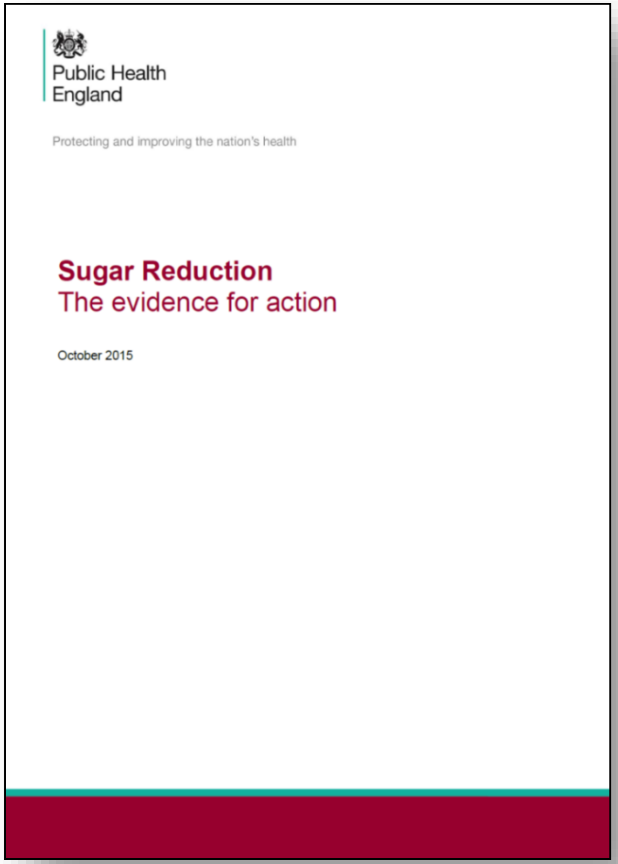
Sugar Reduction: The evidence for action (October 2015)

Public Health England

It is unlikely that a single action alone would be effective in reducing sugar intakes

- The evidence suggests a broad, structured approach, involving restrictions on price promotions and marketing, product reformulation, portion size reduction and price increase on unhealthy products, implemented in parallel, is likely to have a more universal effect.

- Positive changes to the food environment (e.g. public sector food procurement, provision and sales of healthier foods) as well as information and education are also needed to help support people in making healthier choices.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Sugar Reduction
The evidence for action

October 2015

https://www.gov.uk/government/publications/sugar-reduction-from-evidence-into-action

Soft drinks industry levy (SDIL) – HM Treasury lead

Announced March 2016

- Finance Bill received Royal Assent in April 2017, came in to law April 2018
- Applies to manufacturers and importers of added sugar soft drinks and across the whole of the UK
- Two rates based on total sugar content which created an incentive for businesses to reformulate:
  - 18p per litre for the lower sugar products (5g/100ml and above)
  - 24p per litre for the higher sugar products (8g/100ml and above)
- Juices and milk-based drinks are exempt from the levy so become part of PHE’s wider reformulation programme (guidelines published May 2018)
- The exemption for milk drinks will be reviewed in 2020, taking into account the progress made through voluntary reformulation
- Revenue to be used to support schools including funding for programmes that promote physical activity and balanced diets in school-age children.
- PHE is including all drinks in its sugar reduction monitoring programme, as requested by HM Treasury

HM Government Childhood Obesity A Plan for Action

Published August 2016

PHE-led deliverables include

Taking out 20% of sugar in products, achieving salt targets (calories from 2017, & saturated fat considered post SACN)

Supporting early years settings

Supporting primary schools to delivery 30 mins of physical activity daily

Building the knowledge & competencies of the wider public health workforce to address childhood obesity with children & their families

Harnessing the best new technology

https://www.gov.uk/government/publications/childhood-obesity-a-plan-for-action

Food industry and NGO's engagement

May / June 2016

40 individual meetings (manufacturers, major retailers and trade bodies and NGOs)

September 2016

PHE stakeholder briefing on sugar reduction programme (~100 businesses across all food industry sectors, trade bodies and NGOs)

November / December 2016

PHE category specific meetings (manufacturers, retailers, businesses from the eating out of home sector, NGOs, other key government departments and the devolved administrations)

December 2016 to March 2017

Individual meetings with a wide range of businesses to discuss proposals

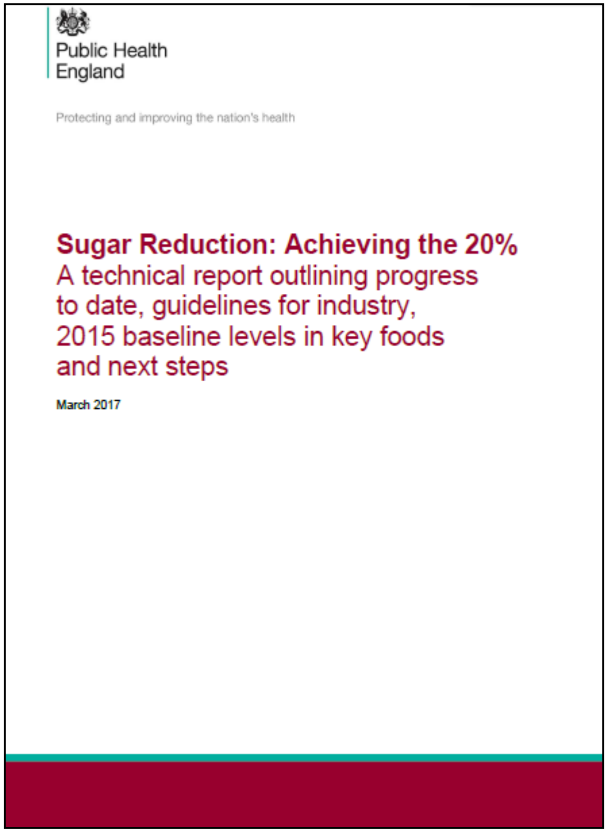
Early 2017

Three sector meetings (retail, manufacturers and eating out of home*, trade bodies, NGOs and devolved administrations) to discuss data / metrics

*An additional programme of engagement with the eating out of home sector has been undertaken.

Sugar reduction and reformulation programme

- Overall ambition is for all sectors of industry to reduce sugar by 20% by 2020 (5% reduction in year 1 by August 2017) in products that contribute most to intakes of children up to 18 years old
- In March 2017 PHE published guidelines for the total sugar levels per 100g and calorie content of products likely to be consumed in a single occasion.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Sugar Reduction: Achieving the 20%
A technical report outlining progress to date, guidelines for industry, 2015 baseline levels in key foods and next steps

March 2017

https://www.gov.uk/government/publications/sugar-reduction-achieving-the-20

Guidelines for industry: principles

Overall target is to reduce sugar by 20% by 2020 (5% reduction in year 1) through :

A voluntary programme of work giving businesses **three methods to reduce the sugar** in their products:

1. product reformulation to lower sugar levels present per 100g/ml
2. reduction in the portion size of, and/or the number of calories in, products that are likely to be consumed by an individual at one time. This means less sugar as well as calories and/or fat
3. a shift in consumer purchasing towards lower/no added sugar products

- The reductions should be accompanied by reductions in calories, where possible, and should not be compensated for by increases in saturated fat.
- Work to achieve the 2017 salt targets should continue alongside the sugar reduction programme

Taking out 20% of sugar in products

- It applies to all sectors of the food industry i.e. supermarkets, manufacturers and eating out of home sector eg restaurants, cafes, fast food outlets/takeaways
- Category specific sales weighted average targets/100g of product were set for achievement by 2020
- In addition calorie or portion size caps were set for single serve products
- The programme focuses predominantly on reducing the levels of total sugars as they are declared on the nutrition panel of food labels
- The guidelines have been developed for the top 9 broad food categories contributing to children's (aged up to 18 years) sugar intake:

Breakfast cereals	Puddings
Yogurt and fromage frais	Ice cream, lollies and sorbets
Biscuits	Chocolate confectionery
Cakes	Sweet confectionery
Morning goods (buns, pastries etc)	Sweet spreads and sauces (chocolate spread, peanut butter, dessert toppings/sauces & fruit spreads)

Sugar reduction and calorie or portion size guidelines

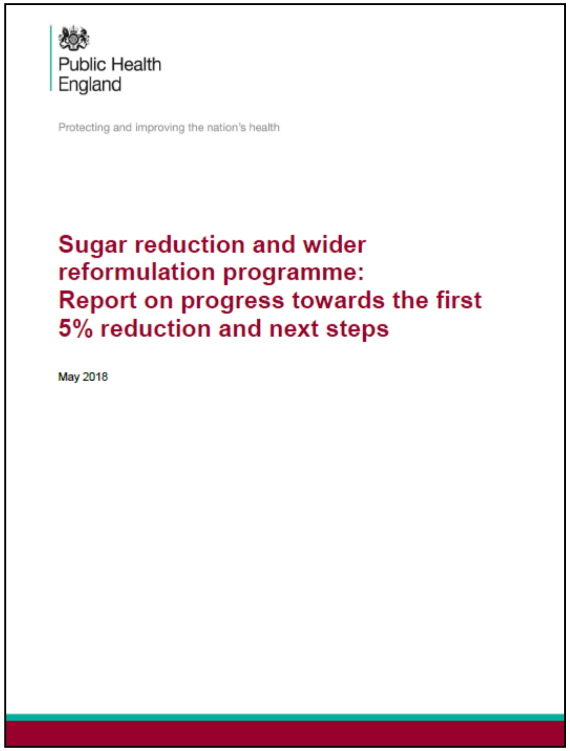
Category description	Baseline sales weighted average for total sugar (g sugar per 100g)	5% reduction guideline (g sugar per 100g)	20% reduction guideline (g sugar per 100g)	Portion guideline – kcals per serve (per portion of a product likely to be consumed by an individual at one time)[a]		Mechanism of most relevance to category		
						Reformulation	Portion size	Shift portfolio of sales
Breakfast cereals: Includes all breakfast cereals, eg ready to eat cereals, granola, muesli, porridge oats.[b]	15.3g	14.6g	12.3g	400 kcals (maximum)		√		√
Yogurts: Includes all sweetened dairy yogurt, fromage frais products including non-dairy alternatives (such as soya, goat, sheep products): Excludes natural yogurt and unsweetened yogurt and fromage frais.[c]	12.8g	12.3g	11.0g	120kcal sales weighted average	175kcal maximum	√	√	√
Biscuits: Includes all types of sweet biscuits including cereal bars and toaster pastries (Pop Tarts); gluten free biscuits; two-finger Kit Kats (but all other sizes are excluded)	32.8g	31.2g	26.2g	100kcal sales weighted average	325kcal maximum	√	√	√
Cakes: Includes all types of cakes, ambient and chilled, including cake bars and slices, American muffins, flapjacks, Swiss rolls.	34.9g	33.1g	27.9g	220kcal sales weighted average	325kcal maximum	√	√	
Morning goods: Includes morning goods such as croissants, crumpets, English muffins, pancakes, buns, teacakes, scones, waffles, Danish pastries, fruit loaves, bagels.	12.5g	11.9g	10.0g	220kcal sales weighted average	325kcal maximum	√	√	
Puddings: Includes all types of ambient (including canned), chilled and frozen puddings.	18.8g	17.9g	15.1g	220kcal sales weighted average	450kcal max 550kcal max for OOH with additions[d]	√	√	

Sugar reduction and calorie or portion size guidelines continued

Category description	Baseline sales weighted average for total sugar (g sugar per 100g)	5% reduction guideline (g sugar per 100g)	20% reduction guideline (g sugar per 100g)	Portion guideline – kcals per serve (per portion of a product likely to be consumed by an individual at one time)[a]		Mechanism of most relevance to category		
						Reformulation	Portion size	Shift portfolio of sales
Ice cream, lollies and sorbets: Includes all types of ice cream, dairy and non-dairy, choc ices, ice cream desserts eg Arctic roll, lollies and sorbets. Average conversion factors have been applied to ice cream products to convert volumes sales in litres to kilograms, and nutrition information provided per 100ml to per 100g. Sugar content in g per 100ml is provided in brackets.	23.2g (13.7g)	22.1g (12.8g)	18.6g (10.8g)	220kcal sales weighted average	325kcal maximum	√	√	
Chocolate confectionery: Includes chocolate bars, filled bars, assortments, carob, diabetic, low calorie and seasonal chocolate.	54.6g	51.9g	43.7g	200kcal sales weighted average	250kcal max		√	
Sweet confectionery: Includes all sweets. Excludes sugar free sweets and chewing gum.	60.6g	57.5g	48.4g	125kcal sales weighted average	150kcal max		√	
Sweet spreads and sauces: Includes chocolate spread, peanut butter, ice cream and dessert sauces/toppings and compotes, jam type spreads that are out of scope of the legislation.				**Portion size guideline (grams per portion of a product likely to be consumed by an individual at one time)**				
Chocolate spread: Includes chocolate hazelnut spreads, milk chocolate spreads, confectionery branded chocolate spreads.	54.8g	52.0g	43.8g	15g sales weighted average		√		
Peanut butter: Includes peanut butter with added and no added sugar and flavoured peanut butter (including chocolate where peanuts are the main ingredient) as well as all other nut butters (eg almond, cashew).	4.9g	4.7g	3.9g	15g sales weighted average		√		
Dessert toppings/sauces: Includes dessert syrups with added sugar, coulis, compotes, cream based toppings, brandy sauce.	48.3g	45.9g	38.7g	15g sales weighted average		√		
Fruit spreads: Includes fruit-based spreads that do not fall under the EU jam definition and legislation.	43.2g	41.1g	34.6g	15g sales weighted average		√		

Sugar progress report – Spring 2018

- PHE has now published (May 22nd) a detailed assessment of progress towards the 5% reduction expected in the first year of the programme
- Report looks at progress across categories, by businesses and in top selling products based on analysis of data for the year ending August/September 2017 compared to the baseline year of 2015.
- There is also an assessment of changes in sugar levels in drinks covered by the soft drinks industry levy (SDIL) during the same period.
- Data used comes from commercial datasets:
    - Kantar Worldpanel for retailers and manufacturers including volume sales and nutrition data
    - MCA for food and drink purchased and consumed outside of the home for volume sales; nutrition data has been collected from information given online, on menus and some data supplied by businesses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Sugar reduction and wider reformulation programme: Report on progress towards the first 5% reduction and next steps

May 2018

https://www.gov.uk/government/publications/sugar-reduction-report-on-first-year-progress

Data limitations

- Data used for analysis is based on “shopping basket” data i.e. what people buy. The datasets used may therefore not yet reflect all the sugar reduction and product reformulation activity in progress or that has taken place to date
- PHE changed the out of home sector data supplier to one that could deliver a more comprehensive dataset for future monitoring. This means it is not yet possible to measure progress for this sector
- Coverage of discount retailers has been improved between baseline and year 1. In particular, Aldi and Lidl are now included but were not included in the baseline so it has not been possible to report on progress for these two retailers
- There are complexities around the data for SDIL products purchased through businesses in the out of home sector so this is also not presented in this report
- It is the intention that the above limitations will be addressed and included in the report due in 2019.

Sugar reduction headline results

- Reductions in sugar levels in 5 out of the 8 food categories where progress measured.
- 2% reduction in total sugar per 100g for retailers own brand and manufacturer branded products
- Reductions in the calorie content of products likely to be consumed in a single occasion in 4 out of the 6 categories
- 2% reduction in calories in products likely to be consumed in a single occasion for retailers own brand and manufacturer branded products
- For out of home, the average sugar content is generally the same and calories in products to be consumed in a single occasion are substantially larger.
- Due to data limitations, it has not been possible to report on progress by the out of home sector in the same way as for retailers and manufacturers.
- It is recognised that reformulated products take time to appear in cafes, restaurants, stores and in shopping baskets and that there are limitations in the data used to make the assessment.
- A clearer indication of progress across the whole industry will be available in 2019.

Results for retailers own label and manufacturers

Across eight of the ten food categories (excluding cakes and morning goods), retailers and manufacturers have achieved a 2% reduction in total sugar and a 2% reduction in calories in products consumed on a single occasion.

Product Category	Sugar per 100g (% change)	Calories in products consumed on a single occasion (% change)
Biscuits	0%	-3%
Breakfast cereals	-5%	n/a*
Chocolate confectionery	0%	-3%
Ice cream, lollies and sorbets (g)	-2%	-7%
Puddings	1%	4%
Sweet spreads and sauces	-5%	n/a*
Sweet confectionery	-1%	0%
Yogurts and fromage frais	-6%	-6%

*n/a = not available as products generally not sold in single serve portions

Results for retailers and manufacturers

Analysis of retailers own brand and manufacturer branded products also shows that:

Of the top 20 brands, ranked by total sugar sales in year 1 (does not add up to 100 due to rounding):

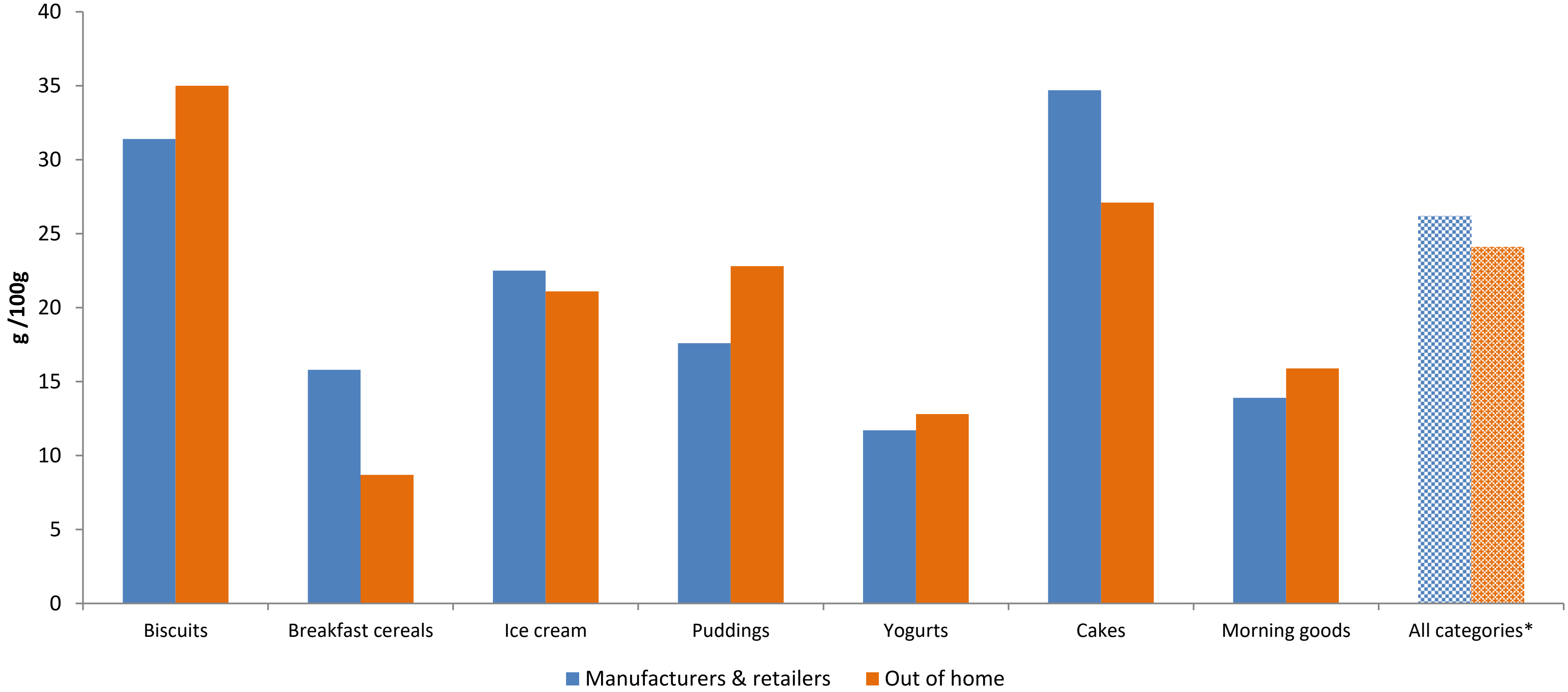
- 33% showed a decrease in the sugar content
- 56% showed no change in the sugar content and
- 12% showed an increase in the sugar content

Out of the top 20 brands which showed a reduction in sugar:

- 37% did not change calorie or saturated fat levels
- 13% showed a decrease in both calories and the saturated fat content
- 6% showed an increase in both calories and the saturated fat content

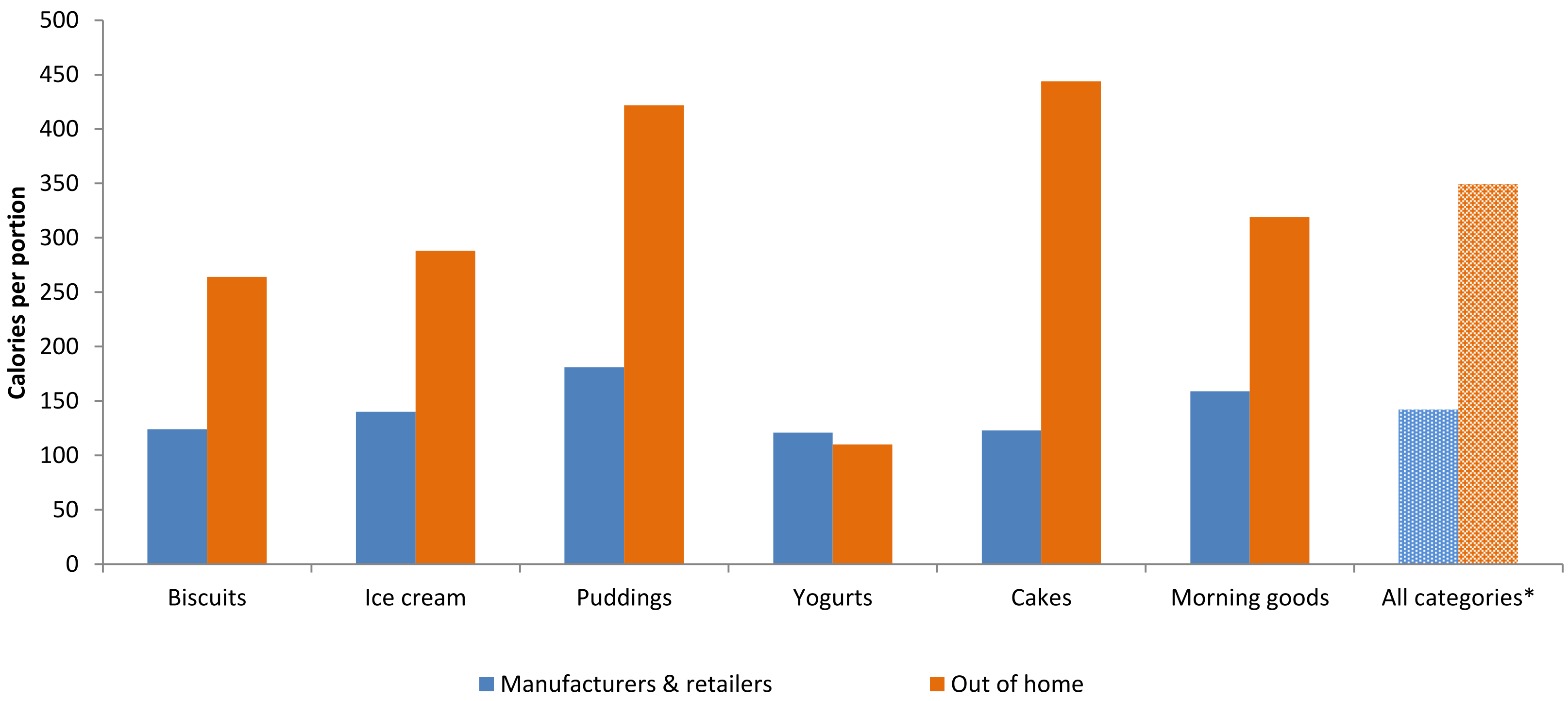
- Changes in calories and saturated fat which are not in the same direction have not been included in these calculations which is why the figures given above do not add up to 100.

Sales weighted average total sugar levels (g/100g) for manufacturers and retailers compared to the out of home sector



***For manufacturers and retailers this excludes cakes, morning goods and breakfast cereals but includes confectionery. For out of home, cakes, morning goods and breakfast cereals are included but confectionery is excluded.**

Sales weighted average calories in products consumed on a single occasion for manufacturers and retailers compared to the out of home sector



***For manufacturers and retailers this excludes cakes, morning goods and breakfast cereals but includes confectionery. For out of home, cakes, morning goods and breakfast cereals are included but confectionery is excluded.**

Soft drinks industry levy (SDIL)

Distribution of total sales volume of levy soft drinks (total sugar g per 100ml) in 2015 and 2017 for retailer own brand and manufacturer branded drinks

For the drinks included in the SDIL, for retailers own brand and manufacturer branded products only, and based on Kantar Worldpanel data:

•Sugar levels per 100ml fell by 11%, and average calories in products consumed on a single occasion also fell by 6%, between 2015 and 2017

•There was a shift in volume sales towards products with sugar levels below 5g per 100ml (these are not subject to the levy)

Childhood obesity: A plan for action, chapter 2

Published in June 2018

Labelling

- Mandate **calorie labelling on the out of home sector** (including online food delivery)
- Explore what **additional opportunities leaving the EU presents** for food labelling

Retail

- **Intend to ban price promotions of HFSS food and drink,** such as buy one get one free and multi-buy offers or unlimited refills of sugary drinks.
- **Intend to ban the promotion of HFSS food and drink by location** (at checkouts, end of aisles and store entrance)

https://www.gov.uk/government/publications/childhood-obesity-a-plan-for-action-chapter-2

Sugar reduction

- Consider **extending the SDIL** to milk-based drinks if they fail to reduce sugar by 2020.
- Consider **further use of tax system** if sugar reduction does not achieve the desired progress
- Consult on introducing a ban to **end the sale of energy drinks to children**

Our national ambition is to halve childhood obesity and significantly reduce the gap in obesity between children from the most and least deprived areas by 2030.

Marketing

- Consult on introducing a **9pm watershed for advertising** HFSS products in broadcast media with similar action in the **online space**

Local communities

- Develop a **trialblazer programme** with LAs to ensure those that want to take action have the knowledge, support and leadership to do so.
- Strengthening **Government Buying Standards for Food and Catering Services**

Schools

- **Review how the least active children are being engaged in physical activity in schools** to ensure that our investment helps all children lead active lives
- A national ambition for every primary school to adopt an active mile initiative, such as **The Daily Mile.**
- Introduce secondary legislation to **update the standards for school food** and take steps to ensure compliance
- Consult on use of **healthy start vouchers** to provide additional support for low income families

Challenges encountered and going forward

- Data, particularly for the eating out of home sector and some categories for supermarkets and manufacturers (cakes, morning goods, ice cream)
- Stakeholder engagement
  - Amount of time taken and different stages
  - Engagement of the out of home sector
  - Publishing information on engagement in order to remain transparent
- Technical issues with making reductions
- Running a reduction and reformulation programme for sugar, calories, salt and baby foods at the same time, both from a PHE point of view and for businesses
- Leaving the EU
- Changing consumer demands
- Value for money
- Competition

Stakeholder engagement – incentives for participation

- Reporting mechanisms – individual products and businesses
- Intention to identify and name those not having taken much action
- Consideration of additional levers (second Childhood Obesity Plan, June 2018):

  “**Consider further use of tax system if sugar reduction does not achieve the desired progress**”

- Action by other stakeholders
- Continuation of work already done
- Internal business decisions on Corporate Social Responsibility

What could industry leadership look like?

- Meet PHE guidance on sugar and salt reduction ambitions
- Commit to the calorie reduction programme
- Support PHE data requests
- Calorie labelling to be consistent, visible, clear
- Reformulate the standard product to become the healthier option as the default
- Encourage other businesses to show leadership
- Trade bodies galvanising members

Next steps for the reformulation programme

PHE will discuss and engage extensively with stakeholders on all these areas:

- Working towards the year two **sugar reduction** progress report – planning to publish towards end summer 2019
- Working towards **calorie reduction** guidelines
- Following publication of the report detailing **progress towards the 2017 salt targets** we are now considering the next steps for the salt reduction programme
- Following a programme of initial discussions with stakeholders we are now considering the scope and ambition for action on **product ranges targeted explicitly at babies and young children**
- The next phase of **engagement with specific parts of the out of home sector** is underway to move forward participation in the reformulation programmes

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