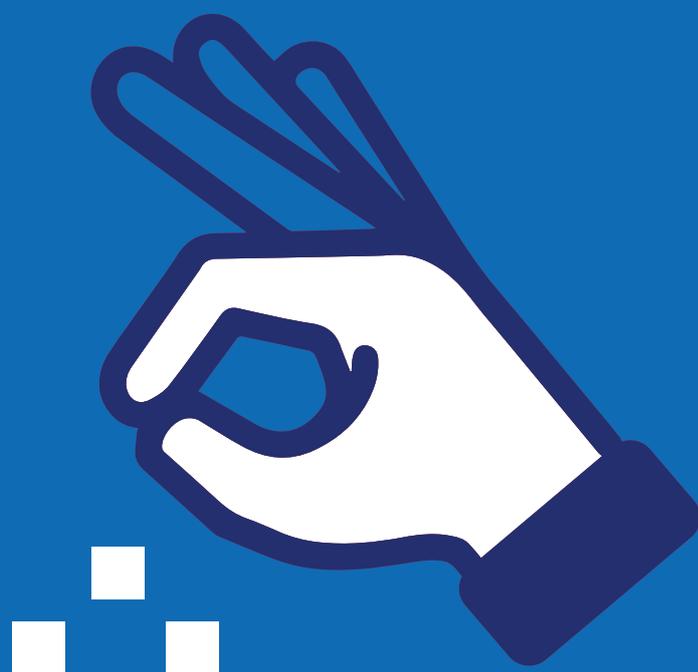


- Common objectives for the improvement of the nutritional characteristics of food products with a special focus on children (aged 3-12)
- Guidelines regarding commercial communications on food products and beverages for the protection of children and their proper nutrition

2017 MONITORING REPORT



Ministero della Salute



FEDERALIMENTARE
Federazione Italiana dell'Industria Alimentare

Common objectives for the improvement of the nutritional characteristics of food products with a special focus on children (aged 3-12)

Guidelines regarding commercial communications on food products and beverages for the protection of children and their proper nutrition

2017 MONITORING REPORT

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INTRODUCTION

The Ministry of Health, with firm determination, and in conjunction with Federalimentare initiated a common process specifically targeting children (ages 3-12), for the **improvement** of the nutritional characteristics of food products and the achievement of more responsible and correct marketing communications. This action was undertaken jointly with IAP (Institute for Advertising Self-Regulation) Istituto di Autodisciplina Pubblicitaria.

During Expo 2015, on October 28 2015, at the end of the “Feed the Planet, Feeding it Healthy” event, the following 2 documents were signed by the Minister of Health, Ms Beatrice Lorenzin, by the President of Federalimentare, Luigi Scordamaglia, and the Presidents of the Associations concerned, AIDEPI, AIIPA (Chips & Snacks Group, Juices and Nectars Group), ASSOBIPE, ASSOLATTE, CONFIDA, FIPE, MINERACQUA, and IAP :

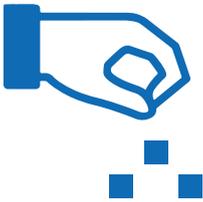
- **“Common objectives for the improvement of the nutritional characteristics of food products with a special focus on children (aged 3-12)”.**
- **“Guidelines regarding commercial communications on food products and beverages for the protection of children and their proper nutrition.”**

This brochure presents the results of a monitoring exercise concerning the implementation of commitments undertaken in certain production areas (cereals-confectionery and ice-cream, non-alcoholic beverages, dairy products) for which relevant producers committed to reduce sugar, saturated and trans fatty acids and salt, increase fiber content and reduce portion sizes.

Also included is the IAP, Institute for Advertising Self-Regulation, report on the monitoring of “Guidelines regarding commercial communications on food products and beverages for the protection of children and their proper nutrition”.

Common objectives for the improvement of the nutritional characteristics of food products with a special focus on children (aged 3-12)

2017 MONITORING REPORT



CEREALS CONFECTIONERY AND ICE-CREAMS AREA

CEREAL CONFECTIONERY PRODUCTS AND ICE-CREAMS

AIDEPI commitments include the following subgroups:

■ Breakfast Cereals

■ Biscuits

■ Crackers

■ Sweet snacks

■ Ice-creams

The monitoring system assesses nutritional reference values calculated as an arithmetical average of top-selling products. On the basis of the market characteristics of (more or less targeted) foodstuffs, the product basket includes:

- A selection of “all family” references potentially consumed by children (breakfast cereals).
- “All family” references and some products intended for children (biscuits).
- Only “all family” (snacks, crackers).
- “All family” products alongside target products for children (ice-creams) .

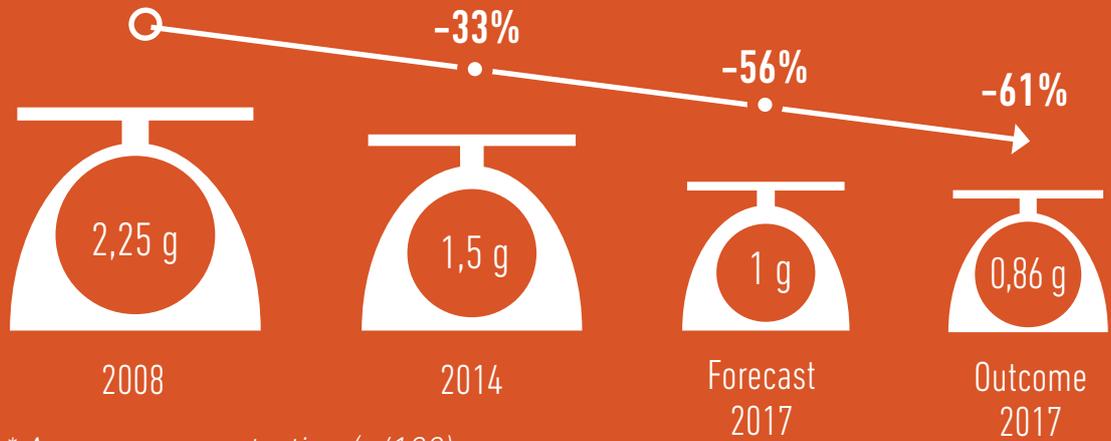
Data processing is based on volume sales in the modern channel, provided by IRi (Information Resources Ltd. <https://www.iriworldwide.com/it-IT>), an external company that carries out market analyses. As far as ice-creams are concerned, industry data were also collected for the out-of-home channel, which was not monitored by IRi. The findings show a marked improvement of nutritional characteristics in the 5 product categories reviewed, compared to the recent past, in terms of sugar, saturated fat, and sodium reduction, fibre increase, and calories per portion decrease of ice-creams and snacks.

Top players have eliminated trans fatty acids issuing from fat dehydrogenation processes and included on their product labels in addition to the mandatory per 100g nutrition declaration, the mention of per portion values and at least with respect to energy the RI% (Reference Intake). This improvement exceeds the targets set for 2017, thanks to voluntary reformulation initiatives carried out by enterprises and to major market changes that have recently occurred and that further accelerated the pace of actions undertaken to meet consumer requirements.



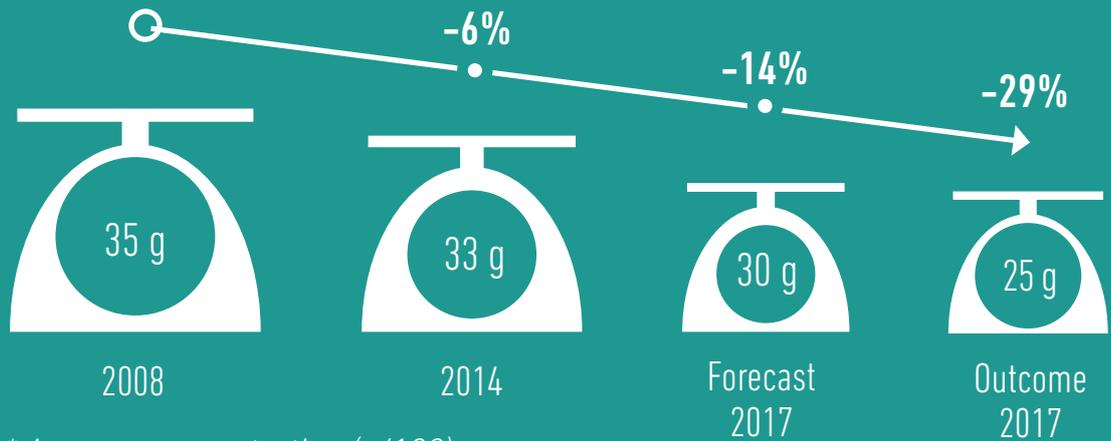
BREAKFAST CEREALS

SALT



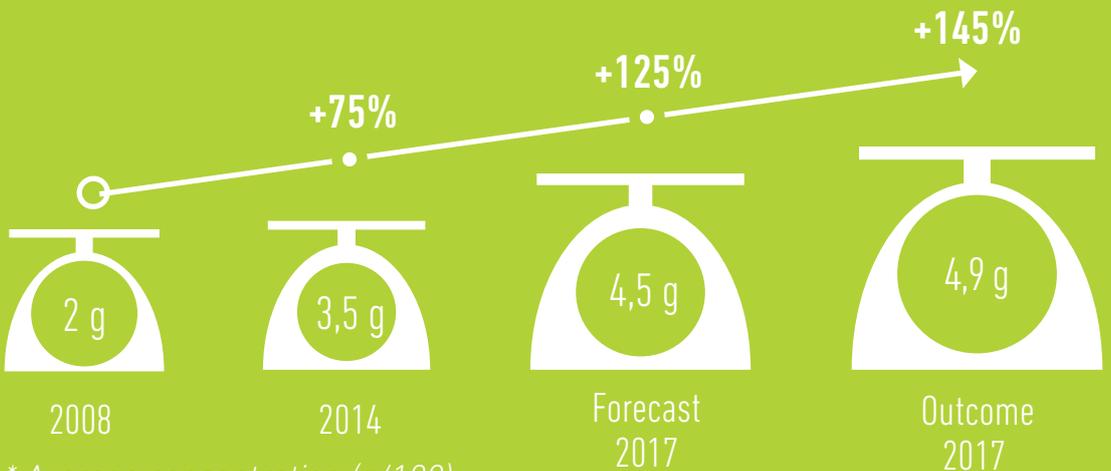
* Average concentration (g/100)

SUGAR



* Average concentration (g/100)

FIBRES

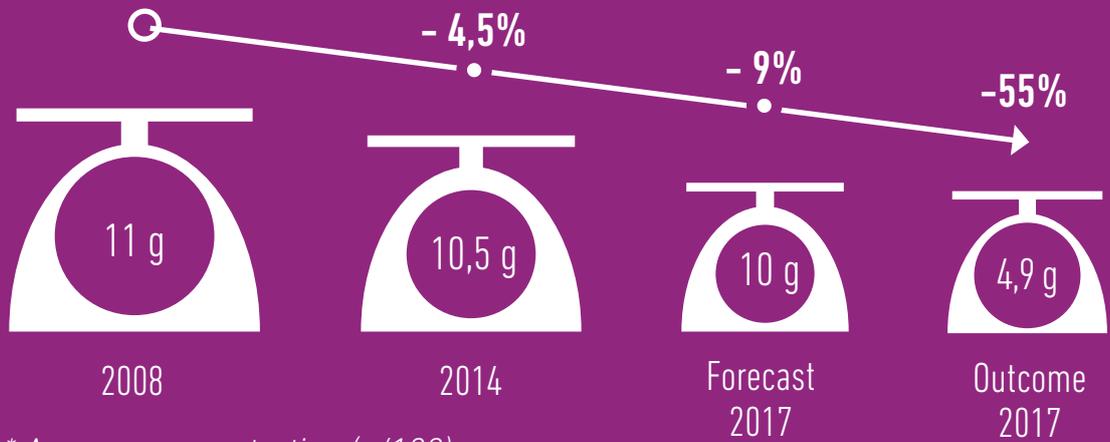


* Average concentration (g/100)



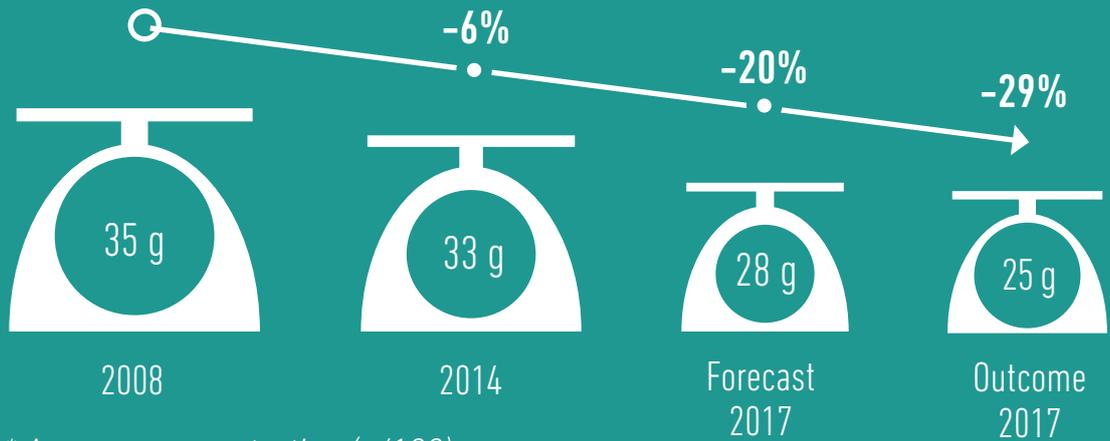
BISCUITS

SATURATED FATTY ACIDS



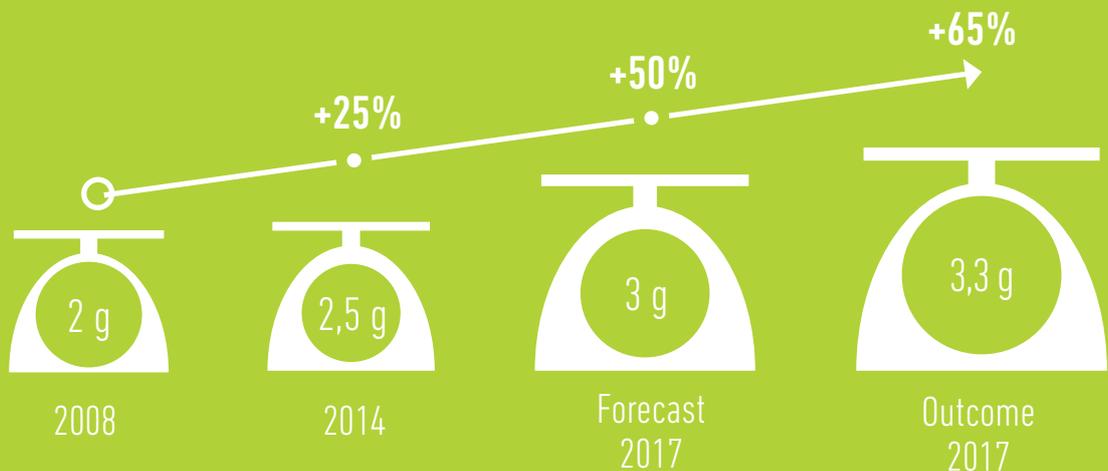
* Average concentration (g/100)

SUGAR



* Average concentration (g/100)

FIBRES

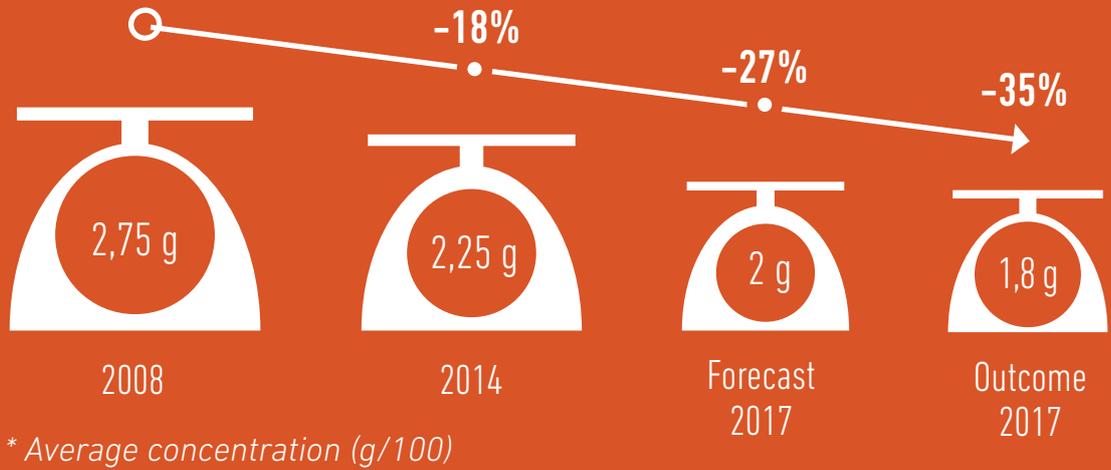


* Average concentration (g/100)

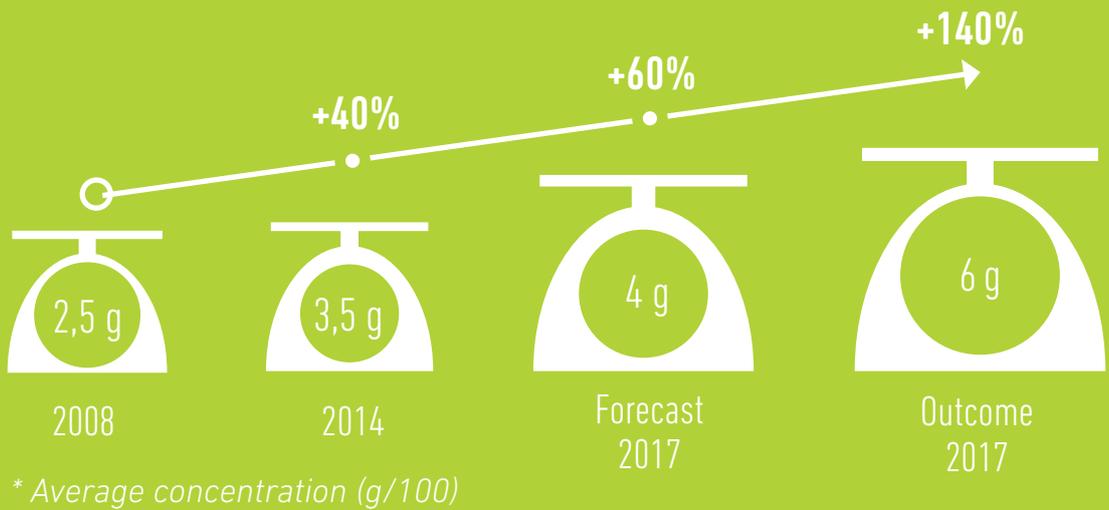


CRACKERS

SALT



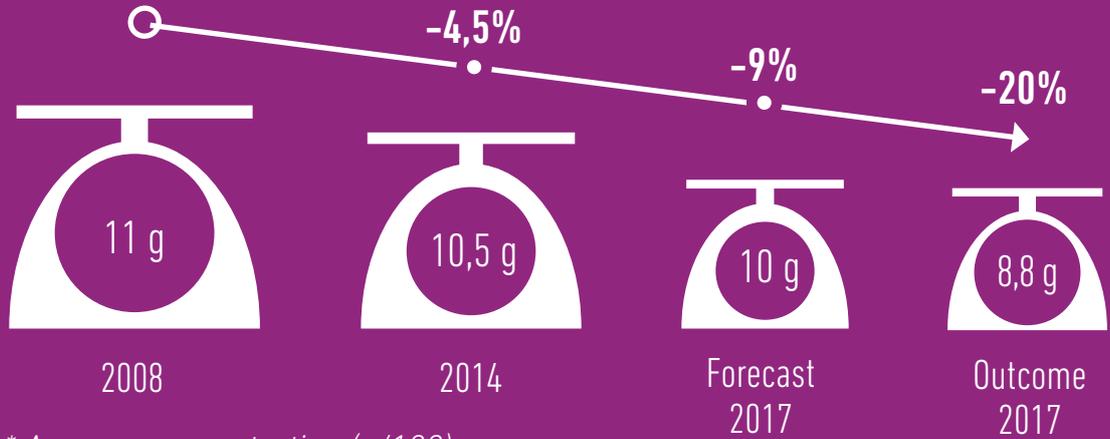
FIBRES





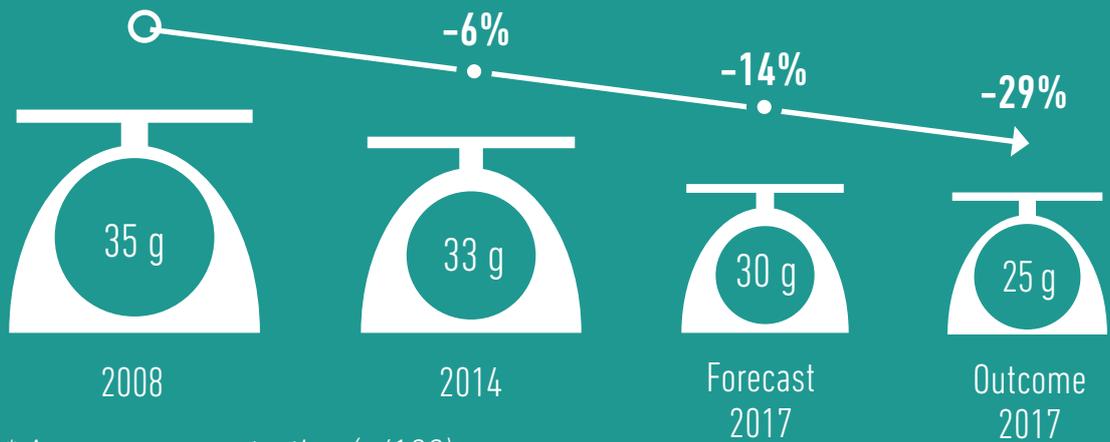
SWEET SNACKS

SATURATED FATTY ACIDS



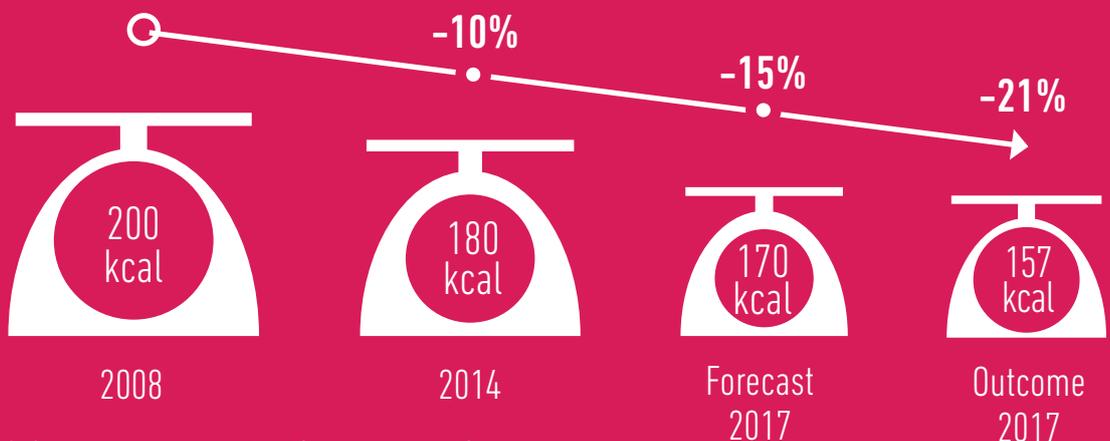
* Average concentration (g/100)

SUGAR



* Average concentration (g/100)

PORTIONS

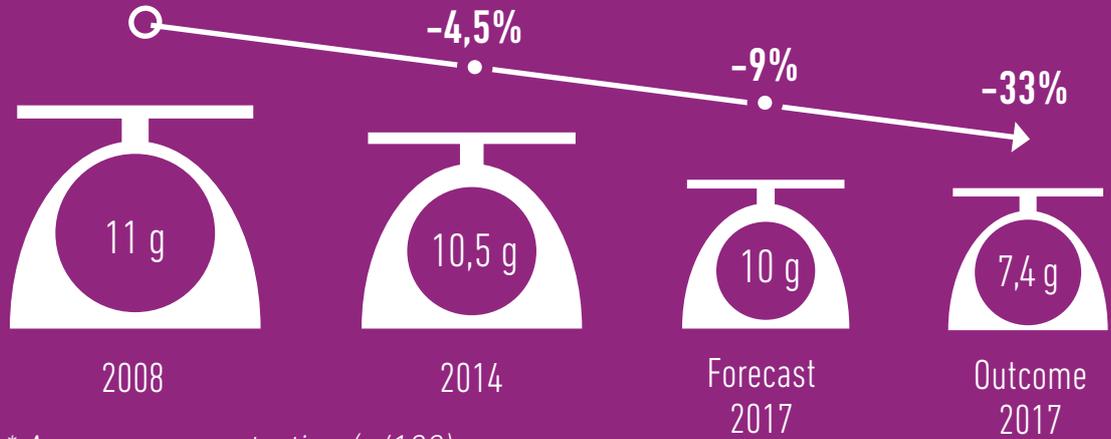


* Average concentration per portion



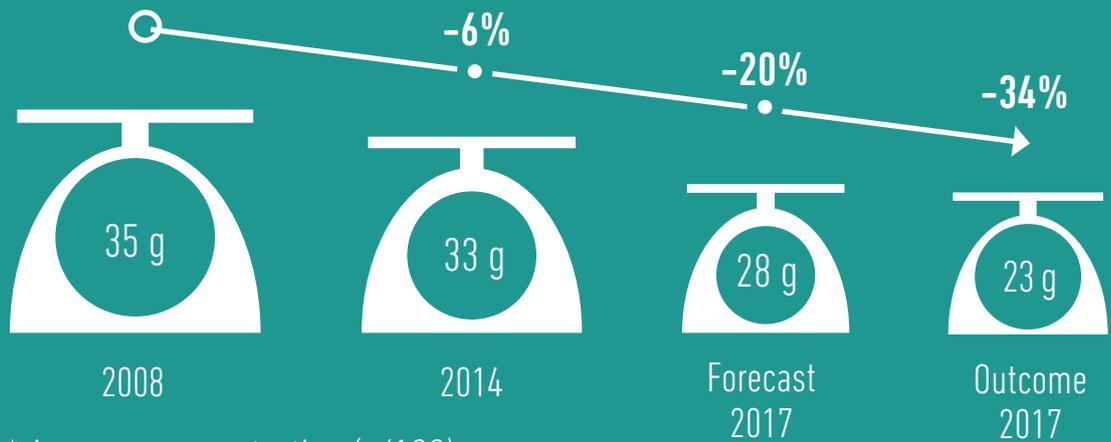
ICE-CREAMS

SATURATED FATTY ACIDS



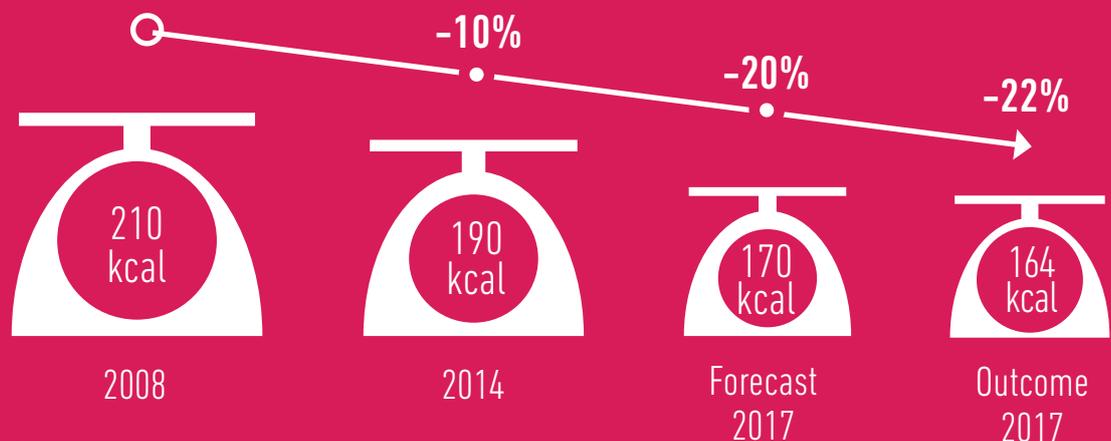
* Average concentration (g/100)

SUGAR



* Average concentration (g/100)

PORTIONS



* Average concentration per portion

SAVOURY SNACKS

AllIPA commitments include the following subgroups:

- **Potato crisps or chips**
- **Other savoury snacks (e.g. extruded snacks, nuts, others)**

The sector proceeded as follows:

- **Singled out** the products most widely sold by AllIPA producers (Source: Nielsen) including launches of new products unavailable on the market in 2008 but compatible with commitment trends.
- **Gathered information** on nutrient values subjected to reformulation in 2008, using internal data of member enterprises as a benchmark against which to compare the values to be entered in the nutritional tables of products manufactured from the beginning of 2018 (commitment implementation deadline indicated: end of 2017).
- **Took into consideration** the mathematical average of the nutritional values subject to monitoring.

Since AllIPA's market share in this sector is not very large, the adoption of commitments should be extended to other actors present on the market so as to render the impact of reformulation on the overall intake level of children aged 3-12 more relevant and significant.

POTATO CRISPS - CHIPS

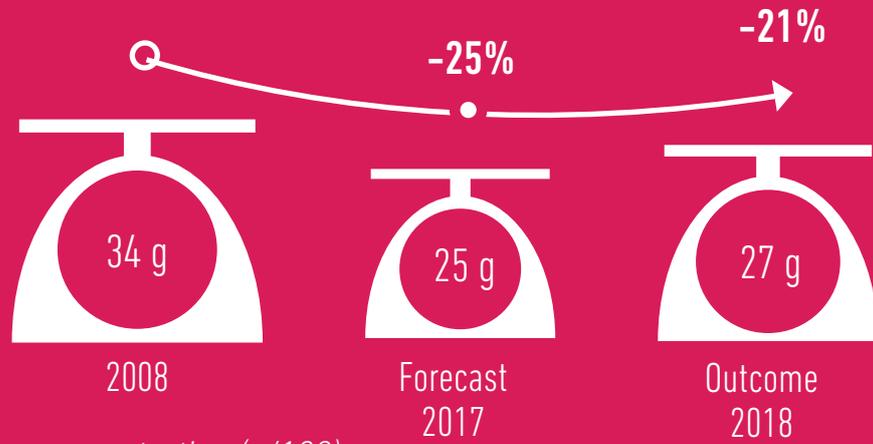
The overall market for potato crisps or chips, from the beginning of the year to November 2017, amounts to 28.078 tons. The market share of AllIPA associates ranges at around 31,4%. The remaining market is held by private labels and businesses that are not members of AllIPA. The goal of reducing saturated fatty acids was achieved, amply surpassing the levels indicated in the document (44% vs. 35%) and the target for total fats (22% vs. 25%) was almost attained. The choice of new production technology combined with the selection of special frying oils, has made it possible to comply with commitments without negatively impacting the overall organoleptic quality of products. However since that value can be influenced by the characteristics of the raw materials used during the year, reference is made to the realistically achievable average (i.e. a 22% reduction).

As regards salt reduction, it will take longer to attain the goals. Such reduction significantly impacts the taste of products and should only be allowed to happen gradually.



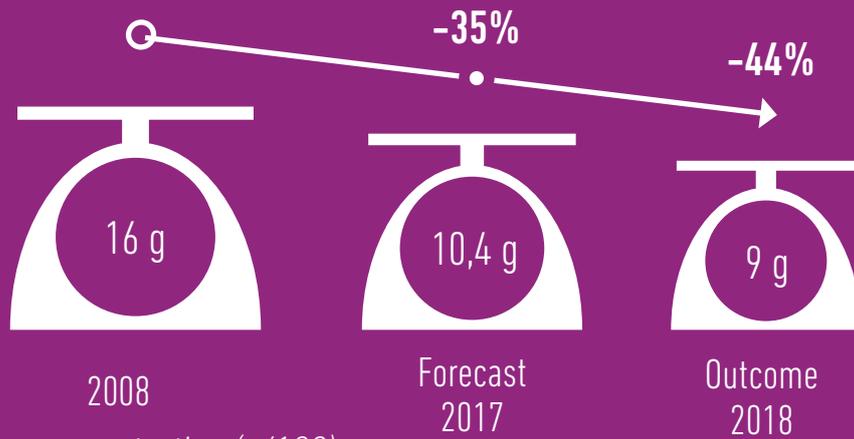
POTATO CRISPS O CHIPS

TOTAL FATS



* Average concentration (g/100)

SATURATED FATTY ACIDS



* Average concentration (g/100)

SALT



* Average concentration (g/100)



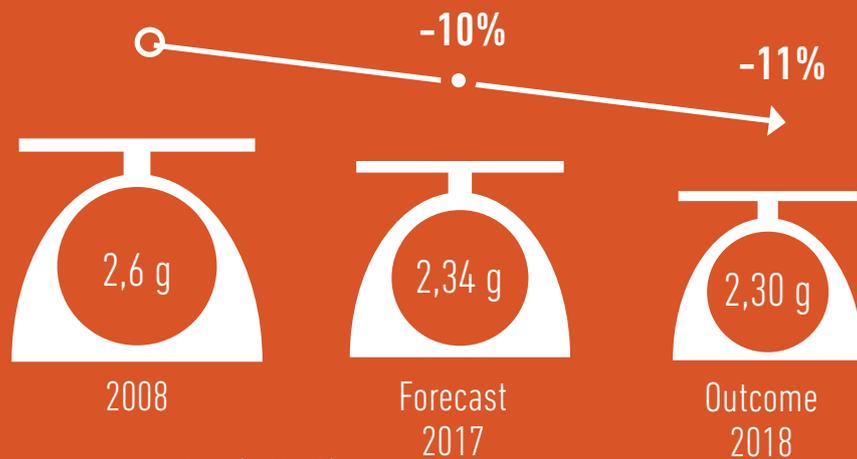
OTHER SAVOURY SNACKS (E.X. EXTRUDED, NUTS, OTHERS)

INFO

The overall market for other savoury snacks, from the beginning of the year to November 2017, amounts to 49.070 tons. The market share of AIIPA Associates is roughly 29.7%. The rest of the market is made up of private labels and firms that are not associated with AIIPA.

Salt reduction has exceeded the targeted level to total 11%. In this case too, we should recall that salt has a significant impact on the taste of products, not to mention the important role it plays in extruded product technology.

SALT



* Average concentration (g/100)

NON - ALCOHOLIC BEVERAGES AREA

SOFT DRINK

ASSOBIBE and MINERACQUA commitments include the following subgroup:

■ Soft drinks

This sector avails itself of data processed by a specialized agency: Canadean (now part of GlobalData, www.globaldata.com), concerning volumes sold in Italy during the reference period and categories (carbonated drinks, energy drinks, bottled cold brew tea/coffee); panels cover 100% consumers of all ages since the products are not intended for individual categories (infants, children, etc.) or age groups.

(*)

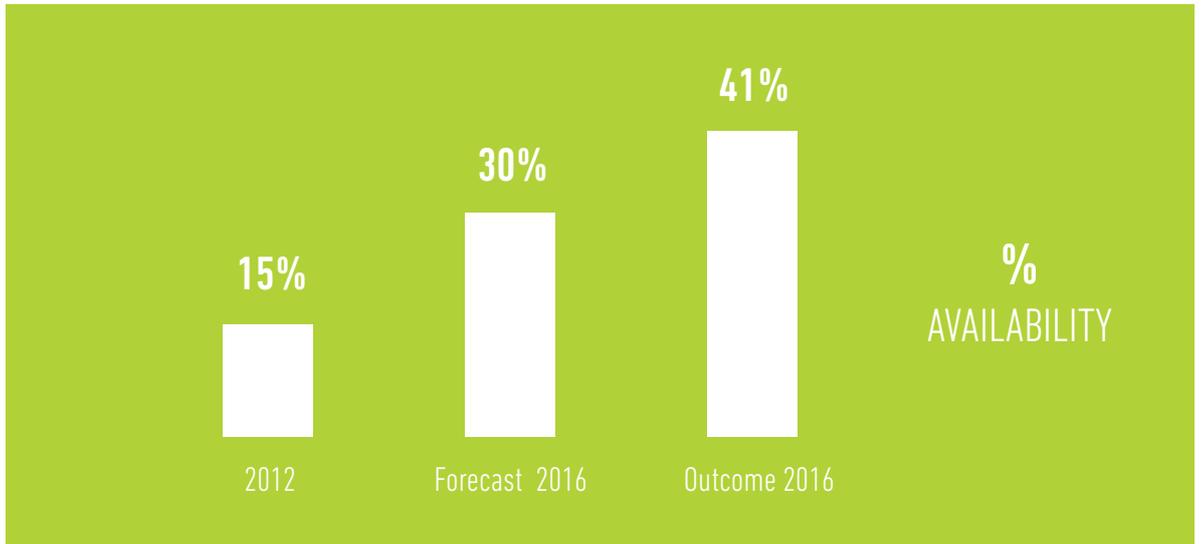
SOFT DRINK

With respect to container size reductions new types of bottles that did not exist in 2008 have become available (e.x. 0.75 L, 0.60 L, 0.33L plastic bottles or 0.25 L, 0.15 L cans) and now represent 7% of market volume.

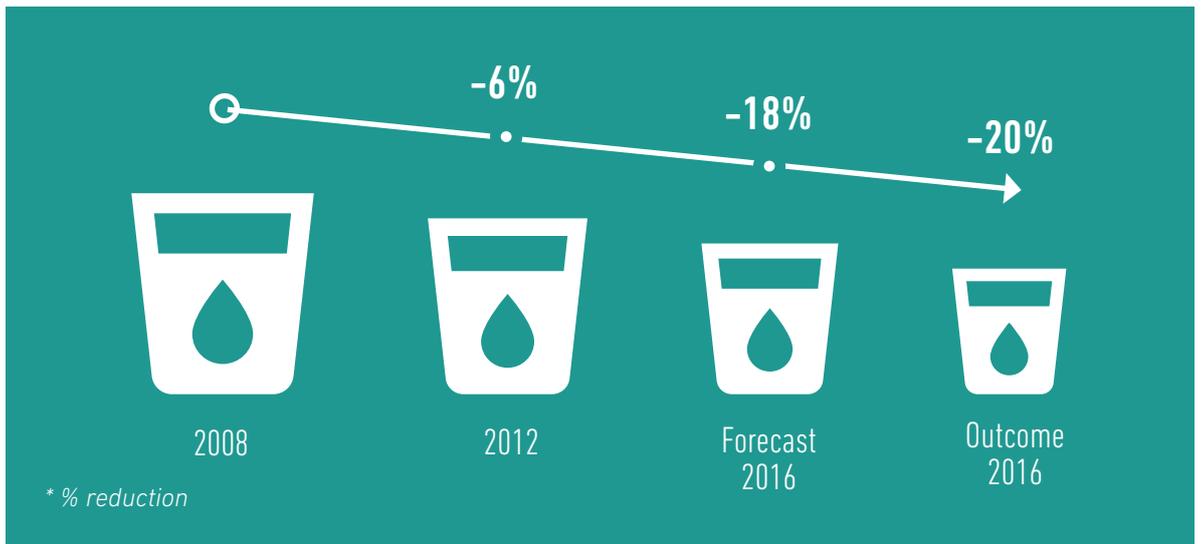


SOFT DRINK

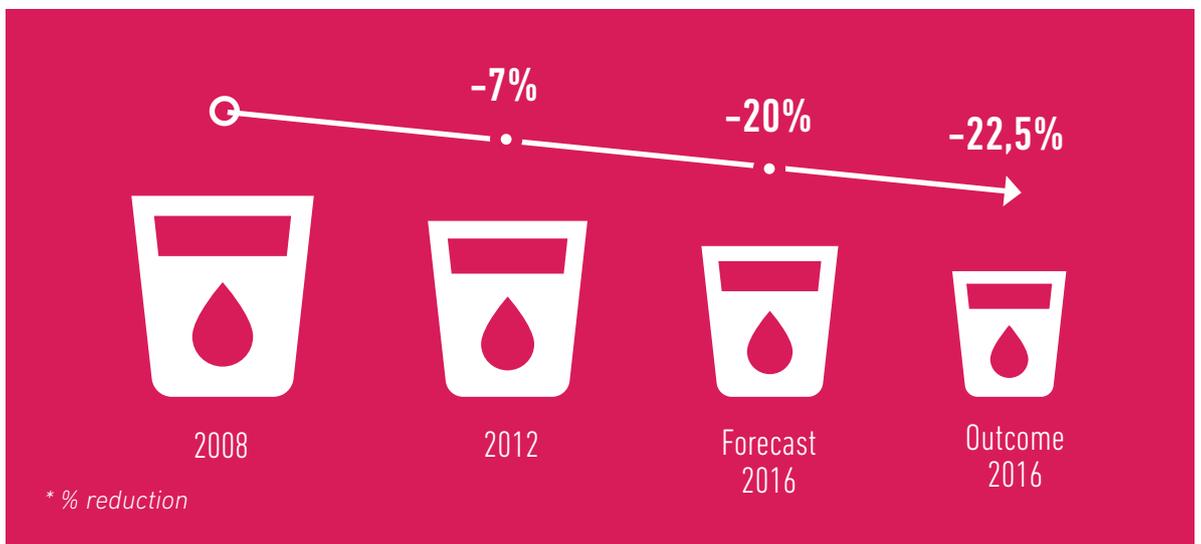
REDUCED ENERGY OR ZERO CALORY PRODUCTS



SUGAR IN PRODUCTS



CALORIES RELEASED FOR CONSUMPTION



NECTARS/FRUIT JUICES AND PULP

AllIPA commitments include:

■ Nectars/fruit juices and pulp

Fruit nectars are compounds of juices and/ or pureed fruit with the addition of water and sugar. When only pureed fruit is utilized nectars may be referred to as “fruit juices and pulp”.

European and national laws set out minimum amounts of fruit, to be mentioned on the label with the wording “ minimum %....fruit”. These amounts range between 25 and 50% and are dependent on fruit acidity.

In Italy, the most consumed nectars/fruit juices and pulp are: pear, peach (minimum 50% fruit), apricot and blueberry (minimum 40%fruit).

Nectars/fruit juices and pulp should be distinguished from “fruit juices” that , as established by law, are composed 100% of fruit, and for which the addition of water is prohibited.

From the beginning of 2017 to the end of that year, the overall market for nectars/fruit juices and pulp amounted to 206.050.000 litres. The market share of AllIPA associate enterprises equaled roughly 24% of the total market. The remainder was covered by private labels and producers that are not AllIPA members.

MONITORING METHOD

The 10 most sold products by AllIPA associates were identified. The mean value of added sugar was determined by taking the market shares of individual AllIPA enterprises into account. Commitments should be extended to include other market players and thus render the impact of reformulation on sugar intake levels more relevant and significant. Producer commitments were aimed at reducing the amount of sugars added to nectars, from an average of 9.0 g/100 ml to an average of 8.0 g/100ml. The reference was to average values because the amount of sugar added varies according to the intrinsic characteristics of the fruit involved.



NECTARS/FRUIT JUICES AND PULP

MONITORING METHOD

With respect to pears, peaches, and blueberries the target was abundantly achieved because the assessed average was 6.8 g/100ml. For apricots, that started off with an added sugar level of roughly 11g/100ml, the average was 10g/100ml, owing to the high acidity of the fruit. In this latter case any further reduction in added sugars could jeopardize the organoleptic quality of the product.

DAIRY AREA

DAIRY PRODUCTS

ASSOLATTE commitments include the following subgroups:

- **Yogurt and fermented milk**
- **Fresh cheeses with fruit**

YOGURT & FERMENTED MILK

The selection and certification of references that make up the product cluster subjected to monitoring, were provided by IRI (Information Resources Ltd., <https://www.iriworldwide.com/IT>), an external market analyses company.

The monitoring programme includes all products belonging to the yogurt and fermented milk category and not only those specifically indicated for children, and excludes:

- Products characterised by strong individual/health consumer connotations (phytosterol added, calcium rich etc.).
- Products with no added sugar (yogurt and natural fermented milk) .
- Products to which (with the exception of the sugar naturally present in milk and fruit) only sweeteners for sweetening purposes were added.
- Private label products.

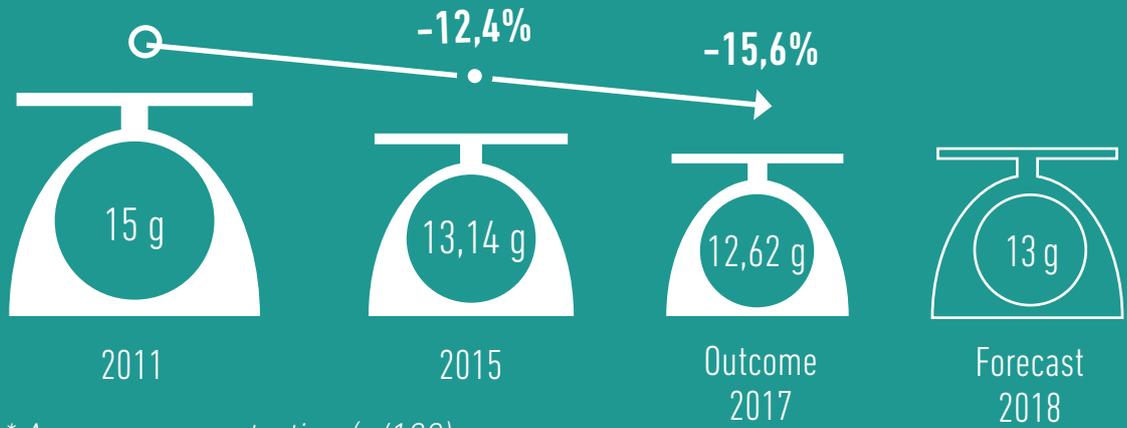
New IRI findings show that compared to a yogurt market totalling 339.300 tons, the “reference” market (private labels excluded) amounted to 283.997 tons in October 2017.

The references found by IRI for monitoring were 460 (EAN single code) for 13 Manufacturers, equivalent to 538 products differing in taste, flavor and/or format. Of these, 467 products – equal to 118.565 tons (41.75% of the reference market) had added sugars in their formulation. The Companies monitored represented over 50% of the yogurt market and over 60% of the reference market.



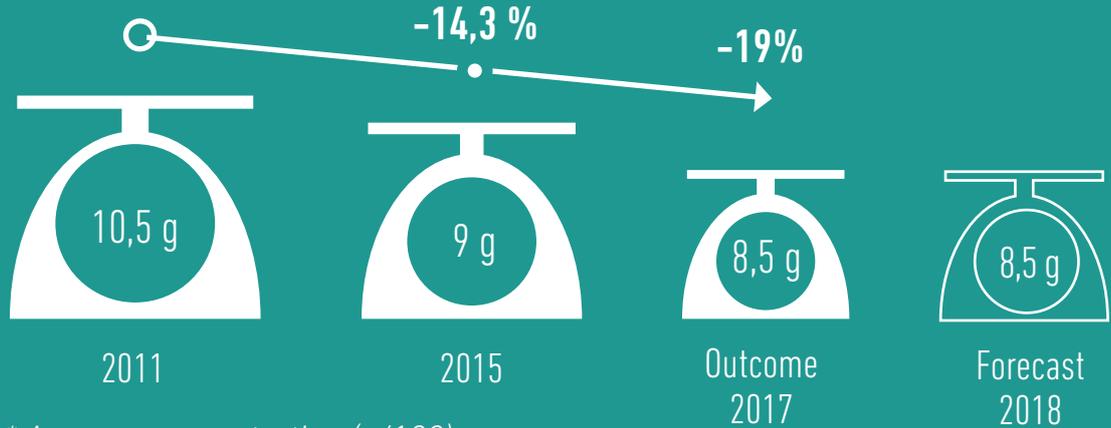
YOGURT AND FERMENTED MILK

TOTAL SUGAR



* Average concentration (g/100)

ADDED SUGAR



* Average concentration (g/100)



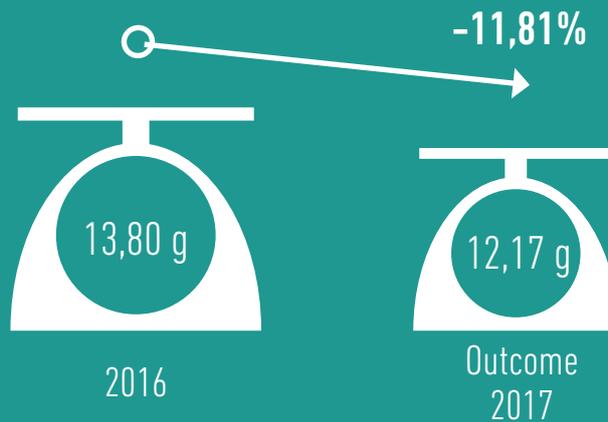
FRESH CHEESES WITH FRUIT

INFO

During those years Manufacturers worked to improve the nutritional profile of another category of products that is not included in the commitments, but is very widely and mostly consumed by children: fresh cheeses with fruit. Reformulation concerned the total and added sugar content of these products. In 2017 the market for fresh cheeses with fruit was 9.174 tons. Excluding retailer branded products (private labels) the reference market amounted to 7.291 tons. References found by IRI, and used in monitoring represent 68% of the market and 85.5% of the reference market.

TOTAL SUGAR

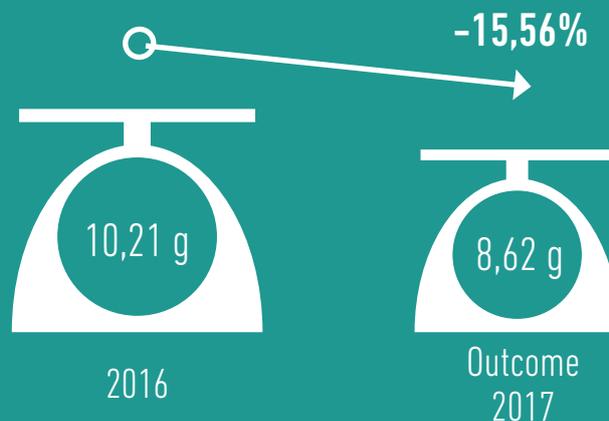
variation %
2016
-
2017



* Average concentration (g/100)

ADDED SUGAR

variation %
2016
-
2017



* Average concentration (g/100)

SUMMARY TABLE

SUMMARY TABLE

(*) average concentration g/100 g		TOTAL FATS	SATURATED FATS	TRANS FATS	ADDED SUGARS	FIBRES	SALT
2014 - 2017	 BREAKFAST CEREALS			0,4 g 0 g	33 g 25 g	3,5 g 4,9 g	1,5 g 0,9 g
	 BISCUITS		10,5 g 4,9 g	0,4 g 0 g	33 g 25 g	2,5 g 3,3 g	
	 CRACKERS			0,5 g 0 g		3,5 g 6 g	2,2 g 1,8 g
	 SWEET SNACKS		10,5 g 8,8 g	0,4 g 0 g	33 g 25 g		
	 ICE-CREAMS		10,5 g 7,4 g	0,2 g 0 g	33 g 23 g		
2008 - 2018	 POTATO CRISP O CHIPS	34 g 27 g	16 g 9 g				1,5 g 1,4 g
	 OTHER SAVOURY SNACKS						2,6 g 2,3 g
2012 - 2016	 SOFT DRINK				-6% (*) -20%		
2015 - 2017	 YOGURT / FERMENTED MILK				9 g 8,5 g		
2016 - 2017	 FRESH CHEESES WITH FRUIT				10,2 g 8,6 g		

(*) REDUCTION PERCENTAGE COMPARED TO 2008



SUMMARY TABLE

(*) average concentration g/100 g		SERVING SIZE IN TERMS OF TOTAL ENERGY INTAKE	AVAILABILITY PRODUCTS WITH LOW OR ZERO CALORY CONTENT	OTHER OPTIONS
2014 - 2017	 BREAKFAST CEREALS			E
	 BISCUITS			E
	 CRACKERS			E
	 SWEET SNACKS	180 kcal 157 kcal		E
	 ICE-CREAMS	190 kcal 164 kcal		E
2008 - 2018	 POTATO CRISP O CHIPS			
	 OTHER SAVOURY SNACKS			
2012 - 2016	 SOFT DRINK	Small-size containers equal to 7% of market volume	15% 41%	
2015 - 2017	 YOGURT / FERMENTED MILK			TOTAL SUGAR 13,14 g 12,62 g
2016 - 2017	 FRESH CHEESES WITH FRUIT			TOTAL SUGAR 13,80 g 12,17 g

(*) E: INDICATES LABELLING IMPROVEMENT CRITERIA

Guidelines regarding commercial communications
on food products and beverages for the protection
of children and their proper nutrition

2017 MONITORING SURVEY



It was the **Ministry of Health's** strong wish that guidelines be established for commercial communications on food and beverages to protect children, their proper nutrition to safeguard them against obesity and overweight through more accurate and responsible commercial communications, to be implemented with the assistance of the Regulatory body for Advertising self-regulation through its regulating role in providing oversight of commercial communications. Indeed the principles and recommendations contained in the guidelines are appropriate and instrumental in strengthening the already available self-regulatory measures as a harmonious element within the Self-Regulatory Code for Commercial Communication.

Advertising and child protection: activities of the Self-Regulatory Institute of Advertising in 2017

An overview of case law regarding self-disciplinary action in our Country shows that advertisements for food product marketing are rarely in breach of Article 11 of the "Children and Adolescents" Code and even recently Guidelines have been amply implemented. In 2004, with a view to introducing more specific and evolved parameters, the afore mentioned Article 11 was broadened as follows: "Advertisements targeting minors shall not induce: a diminishing of the role of parents and other educators in providing valuable dietary indications; or the adoption of unbalanced dietary habits and behaviour; or the neglect of a healthy lifestyle".

In 2017 the Self-regulation bodies reviewed 133 cases concerning the food sector that may be divided as follows:

- **Control Committee >> 129 cases**

- 32 Messages examined prior to their airing or publishing (prior opinion), 10 of which relating to child nutrition.
- 79 Messages dismissed for lack of compliance with the provisions of the Code.
- 6 Messages dismissed for cessation.
- 2 Messages dismissed as a result of corrective action by the advertiser prompted by Committee advice.
- 10 Dismissed on grounds of lack of jurisdiction/decision not to proceed.

- **Jury >> 4 rulings**

In particular see Jury decisions n. 61/2017 and 36/2017

Cases of possible direct impact on and appeal to children were 6 but since they were dismissed, no formal action was taken (i.e. Committee injunctions or Jury rulings) and were not published on the IAP site. Conversely, one of the four rulings concerning the food sector issued by the Jury in 2017 (Jury n. 61/2017), reiterated the principle whereby the Self-regulation Code, in the broad sense, attributes an educational function to the advertising message of sweets and other foods when their limited use is appropriately suggested. In effect, in this case when the message is addressed to an audience of children or adolescents, the adoption of unbalanced dietary habits or behavior, or disregard for healthy lifestyles should not be induced.

CONCLUSIONS



The implementation of policies for correct dietary styles and food that is adequate in terms of energy and balanced in its components from the nutritional standpoint cannot be achieved effectively without the contribution of all the players involved within the overall system, not least the food industries that supply the market.

The memorandums of understanding: “Shared goals for the improvement of the nutritional characteristics of food products with a special focus on child population (ages 3-12)”, and “Guidelines for commercial communications regarding food products and beverages to protect children and their proper nutrition” are instruments that foster full and concrete implementation of agreed commitments through policy actions aimed at facilitating consumer choice, suited to personal lifestyles, as called for in the documents mentioned above, with the purpose of combating childhood obesity.

They are a paradigm of collaboration between industry and Central Government that can be extended to other population segments and product types, with a view to following up on the WHO (World Health Organisation) requirement that Member States promote the necessary synergies to fight against chronic degenerative diseases, an endeavour that calls upon the participation of the many different players involved in the integration of **“health in all policies”**.

Paramount and instrumental, in the achievement of the Understandings provided for in the two Memorandums, is an informed awareness on the part of industry, here represented by Federalimentare, of the problem prevailing in our Country and worldwide. Food industry – that in the past 15 years has improved the nutritional characteristics of over 4200 food products and reduced portion sizes for another 3600 – has become a partner in finding a solution to the problem, in the awareness that health is linked to correct lifestyles, nutritional quality of food, portion size and frequency of intake of certain foods. The results obtained are a major starting point in planning future strategies that call for the involvement and accountability of other important players along the food chain.

List of associations involved

A.I.D.E.P.I.

Italian Association of Confectionary and Pasta Industries

A.I.I.P.A. (Fruit Juice and Nectar Group – Chips & Snacks Group)

Italian Association of Food Products Industry

ASSOBIBE

Italian Soft Drinks Association

ASSOLATTE

Italian Dairy Association

CONFIDA

Italian Association of Vending Machines

FEDERALIMENTARE

Italian Federation of Food Industry

FIPE

Italian Federation of Bars Catering Casinos and Entertainment

MINERACQUA

Italian Mineral Water Association

(Natural Mineral Water/Spring Water & Non-alcoholic Beverages)

Common objectives for the improvement of the nutritional characteristics of food products with a special focus on children (aged 3-12)

Guidelines regarding commercial communication on food products and beverages for the protection of children and their proper nutrition



Directorate-General for hygiene, food safety and nutrition · office 5



Ministero della Salute



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Federazione Italiana dell'Industria Alimentare