



WAKE UP!

to Breakfast Cereal

Reassessing the nutritional value of Breakfast Cereals in the context of UK Food Policy - A FIVE-POINT PLAN



Foreword

For over 100 years, families across the UK have relied on the convenience, nutrition and value for money of breakfast cereals to start their day well.

Today, breakfast cereals are consumed regularly by over 48 million adults in England, Scotland, Wales and Northern Ireland and our sector employs over 4,300 people across 15 separate UK based manufacturing facilities.

Our members have built close and enduring relationships with communities, including the many farmers who supply their businesses with cereal grains. Collectively we have invested hundreds of millions of pounds to build thriving manufacturing sites and create family-favourite cereal brands that are loved at home, and proudly exported around the world.

We live in rapidly changing times, where concerns about poor diets and public health are at the forefront of policy thinking by Government. Our industry has a long track record of engaging with these challenges to shape consumer preferences over time. Breakfast Cereals UK members have reduced sugar in their products by 19.9% since 2010 and salt by 64% since 1998, but we recognise there is more work to be done.

This Roadmap outlines our five commitments to promote the positive nutritional benefits of Breakfast Cereals at the same time addressing the valid concerns of our key stakeholders.

Our five commitments are:

1. We commit to help people eat more fibre & wholegrain
2. We will continue to reduce sugar
3. We will maintain low levels of salt
4. We will continue to advertise responsibly
5. We will make it easy for consumers to understand the nutritional content of our products.

We will continue to work collaboratively with the UK Government. In addition to supporting Public Health England (PHE) initiatives, many of our members participate in the Government's 'Change for Life' campaigns. We want to build on this engagement and call on Government to recognise our constructive approach and work with us to help increase fibre and wholegrain intakes.

I am delighted to share this first BCUK roadmap and look forward to working in collaboration with those who share our common ambitions.




A handwritten signature in black ink that reads "Gharry Eccles". The signature is fluid and cursive, with a long horizontal line extending from the end.

Gharry Eccles
Chair of Breakfast Cereals UK
Regional Vice President Cereal Partners Worldwide (Nestle & General Mills)



Breakfast cereals contribute

 **9%**
of the fibre
in the diet of children aged 4-10*

Context

Breakfast Cereals UK represents the UK's leading breakfast cereal producers including Cereal Partners Worldwide, Jordans Dorset and Ryvita, Kellogg's, Morning Foods and Weetabix.

In this document, we present evidence to demonstrate that breakfast cereals are a strategically important food. They are low cost, convenient, and an important source of fibre, whole grains and micronutrients. In addition, as they are usually eaten with milk they help maintain calcium intakes at recommended levels. In a 'real world' context they are foods that meet the needs of UK consumer lifestyles and can help drive positive nutritional benefits at scale.

However, since 2010 sales of branded breakfast cereals have declined by 26%. Sales of breakfast cereals overall have declined by 0.9% since 2015. National Diet and Nutrition Survey (NDNS) data indicates a decrease in population intakes of most micronutrients since 2008. At the same time childhood obesity levels have not reduced and obesity levels within the adult population have increased.

We recognise that our industry has been subject to criticism, specifically on the issue of added sugars within some products, and our members have set out to address this through reformulation and other activities, some of which are summarised within this booklet.

At the same time, we call on Government to recognise the value of breakfast cereal products as part of creating a positive food culture across the UK that promotes good nutrition and reduces the incidence of people being overweight or obese.

Nutritional Challenges

The UK Eatwell Guide clearly shows that starchy foods should make up just over a third of the food we eat. It recommends consumers choosing higher fibre wholegrain varieties, such as wholegrain breakfast cereals. Despite this, across all age groups at least 90% of people do not meet their fibre requirements in the UK.

Fibre intake deficiency:

Only 10% of children aged 1.5-10 years; 4% of those aged 11-18 years and 9% of adults aged 19-64 years meet the recommended fibre intake.*

Micronutrient intake deficiency:

54% of girls and 27% of women do not consume enough iron; approximately 1 in 5 people have low vitamin D levels; 28% of girls and 15% of boys aged 11-18 years and 7% of adults aged 19-64 years have low blood folate levels.*

Overweight and Obesity prevalence:

63% of adults and 28% of children have been assessed as being overweight or obese. Children from deprived families are statistically more likely to be overweight or obese.**

* source: National Diet and Nutrition Survey (NDNS) Yr 7-8

** source: Health Survey for England (2018) - December 2019 update.



The nutritional evidence in support of breakfast cereals

Breakfast cereals remain an extremely important food category in the context of the UK diet.

Consumption of breakfast cereal in the UK was promoted as a strategic health priority during the 1950s and 1960s as a means of addressing deficiencies within the UK diet. At a point in time where nearly half of all deaths were due to cardiovascular disease and many people suffered from malnutrition, breakfast cereal consumed with milk was an important means of increasing vitamin and mineral consumption, especially calcium.

The dietary context of the UK has shifted significantly over the past 40 years, from a focus on malnutrition from poor diet, to the health risks posed from obesity. As a consequence, many of the positive nutritional attributes of our products that were previously well understood are now less widely acknowledged.

During the 1990s and 2000s, breakfast cereals were criticised in relation to their salt and sugar content in particular. In response, manufacturers have reformulated many of their products, reducing salt by 64% since 1998 and cutting added sugar from recipes by 19.9% since 2010.

The average cost of breakfast cereal with milk per serving is



Did you know...?

Breakfast cereals are regularly consumed by

87%
of children

(10 million people in the UK*)



Breakfast cereal producers have cut salt by

64%

since 1998



Breakfast cereal producers
have cut added sugar
by nearly

20%

since 2010



Sugar and Calorie Reduction

Breakfast cereals are not a major source of calories in the British diet. They contribute 4% to the total energy intake of 19-64 year olds, and 5% to 4-18 year olds.

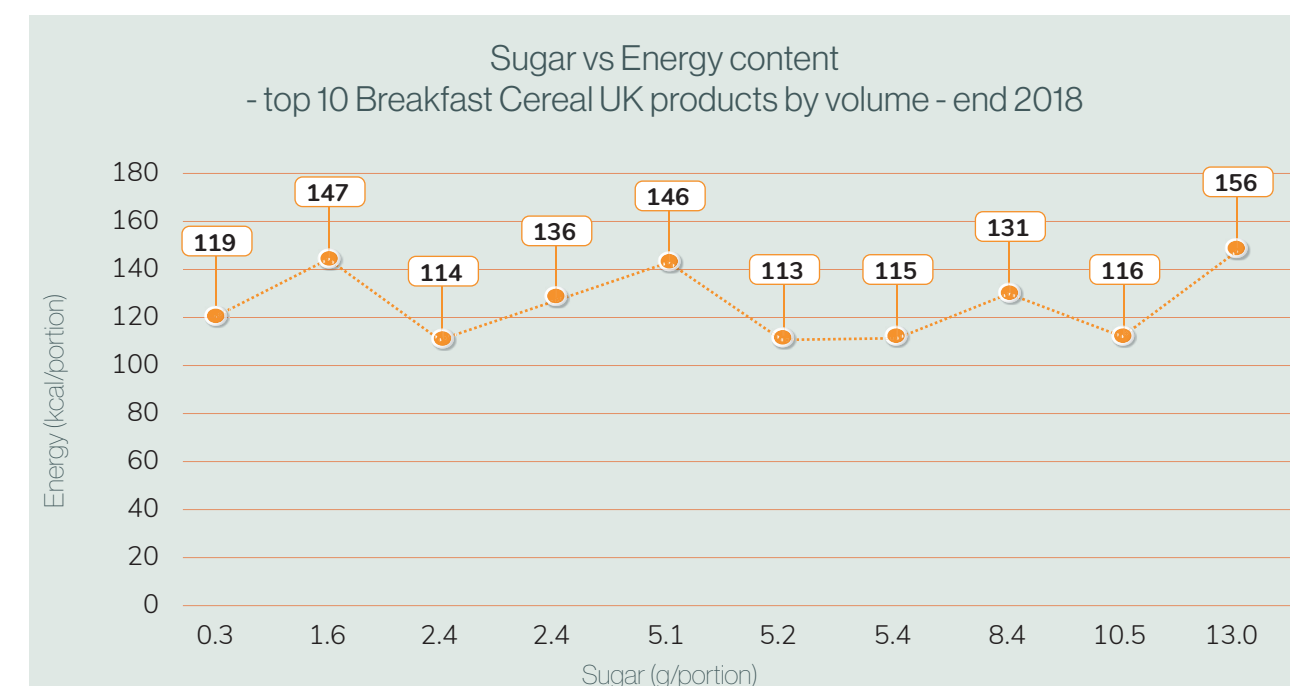
(The average calorie content per 100g weighted by volume of sales (Sales Weighted Average) is 377.4 kcal, or c. 170 kcal per 45g portion.)

The principal concern raised in relation to breakfast cereals has been the use of sugar in many recipes, which is the main factor that would result in some products failing the High Fat Salt Sugar criteria defined by the UK Nutrient Profiling Model. Since 2010 Breakfast Cereals UK members have voluntarily reduced the added sugar in their products by 19.9%, and some products as much as 80%.

However, it is also important to note that sugar reformulation in itself is unlikely to lead directly to calorie reduction. As sugar is a carbohydrate it contains 4 kcal per gram, compared to fat, which contains 9 kcal per gram. When sugar is removed from a breakfast cereal it is typically replaced with another carbohydrate (cereal grains) which will also typically contain 4 kcal

per gram. This point is illustrated in the following graph which shows the top 10 selling breakfast cereals broken down by sugar and calorie content. Note the fact that calorie content per portion is broadly consistent despite differences in sugar content.

A percentage of the calorie content in some muesli and granola products in particular, will come from sources such as fruit and nuts, which will contain some naturally occurring sugars and fats, but are acknowledged by UK Government nutritionists as contributing towards a healthy, balanced diet.* Furthermore, it has been shown that adults who eat breakfast are less likely to be overweight or obese than those who skip breakfast and are less likely to regain weight after weight loss.

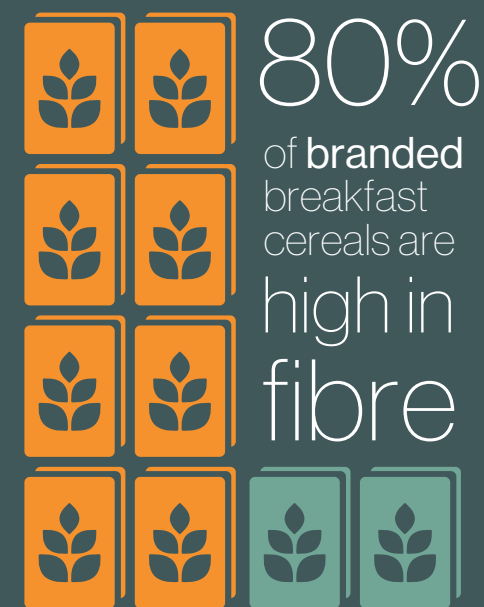


Note: Carbohydrates including sugars and cereals all contain 4 kcal per gram. Therefore, the calories per portion of different breakfast cereal recipes remain broadly consistent irrespective of any variation in their sugars content.

* source: Brikou D. et al. (2016) Breakfast consumption and weight loss maintenance: results from the MedWeight study Br J Nutr, 115 (12): 2246-51

Breakfast Cereals and Fibre

80% of branded breakfast cereals are high in fibre. National Diet and Nutrition Survey (NDNS) data shows that breakfast cereals contribute 9% of the fibre in the diet of children aged 4-10 and the consumption of breakfast cereal is generally associated with higher fibre intake.



There is strong evidence that increased intakes of total dietary fibre, and particularly cereal fibre and whole grains, are associated with a lower risk of cardio-metabolic disease (cardiovascular diseases, coronary events, type 2 diabetes) and colorectal cancer. Randomised controlled trials also indicate that higher intake of oat bran and isolated β -glucans leads to lower total cholesterol, LDL-cholesterol and triacylglycerol concentrations and lower blood pressure. There are several EU authorised health claims for oat β -glucans with two relating to both maintenance and reduction of blood cholesterol.

The lack of fibre in the UK diet was acknowledged by SACN in their report on Carbohydrates published in 2015 which called for an increase in the population's fibre intake to an average of 30g per day for adults. Fibre intakes in children are around a third lower than SACN recommendations. Only 4% of teenagers and 10% of younger children are achieving the recommended fibre intakes.*

Contribution of fibre, micronutrients, free sugars and sodium from breakfast cereals.*	Nutrient	Children (4-10)	Children (11-18)	Adults (19-64)	Adults (75+)
	Energy	5%	5%	4%	5%
	Fibre	9%	6%	6%	9%
	Sodium	4%	3%	2%	3%
	Free Sugars	8%	8%	4%	4%
	Folic Acid	19%	15%	9%	11%
	Thiamin (Vit B1)**	18%	14%	10%	11%
	Riboflavin	17%	14%	9%	12%
	Niacin**	12%	9%	7%	8%
	Vitamin B6**	15%	11%	7%	9%
	Vitamin D	18%	18%	7%	8%
	Iron	23%	17%	11%	14%

* source: NDNS Yr 7-8
** source NDNS Yr 1-4



16% of 11-15 year olds in the UK go to school **without** having eaten **breakfast**



Breakfast Cereals and Micronutrients

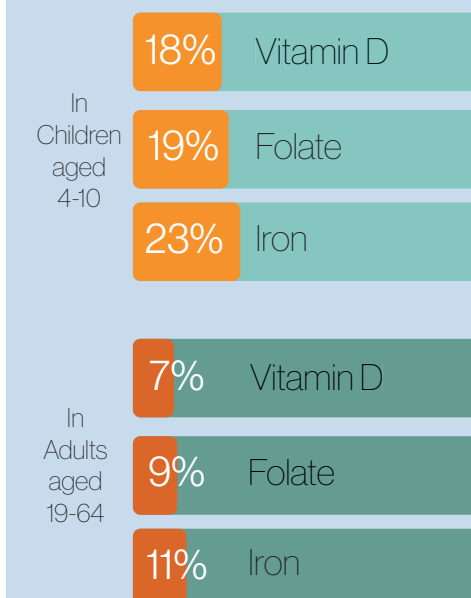
Breakfast cereals provide a range of essential micronutrients in the diets of many children and young adults

There are a number of groups within the UK population who are especially vulnerable to inadequate intakes of micronutrients. Teenage girls and women of childbearing age are of particular concern because of their high requirements for some micronutrients and the impact poor micronutrient intakes can have on the health of their children.

Breakfast cereals can be a significant source of micronutrients, and dietary surveys continue to highlight breakfast cereals as a key source of vitamins and minerals in the diet. Micronutrient contribution from breakfast cereals for children aged 4-10 is 19% folic acid, vit B6 15%, vit D 15% and iron 24% (Source NDNS). Calcium intakes are also higher in groups consuming breakfast cereals, with the addition of milk to most cereal breakfasts a contributing factor. Many breakfast cereals are also made with dried fruits, nuts and seeds.

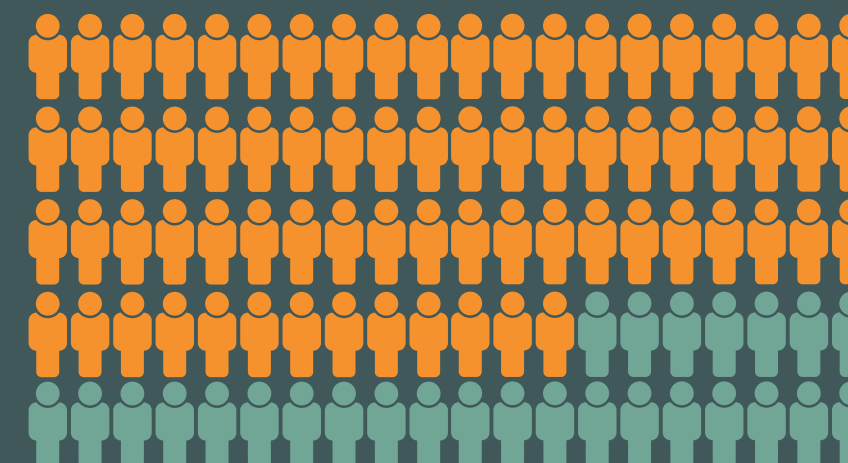
Did you know...?

Breakfast cereals account for:*



Breakfast cereals are regularly consumed by

73% of adults
(38 million adults in the UK**)



* source: NDNS Yr 7-8

**source: Kantar Data 2020

Our Five Point Plan

The following collective commitments outline our industry approach to promoting the positive nutritional benefits of our sector, at the same time as addressing the legitimate concerns of stakeholders.

1. We commit to help people eat more fibre and whole grains

Breakfast Cereals UK members are actively supporting school breakfast clubs and other activities that promote the consumption of fibre and whole grain in the diet. We commit 80% of industry promotion will be focussed on products that are designated under EU law as being either a source of fibre or high in fibre. Furthermore, we pledge to work with Government to promote the benefits of fibre consumption in line with the recommendations of SACN to increase fibre consumption in the UK population.

2. We will continue to reduce added sugar

We commit to continue to work towards the UK Government's target to reduce added sugars in breakfast cereal products. UK Government reduction targets are based upon a Sales Weighted Average (SWA) model which is calculated based upon the average total sugars content of the products that people choose to purchase from food retail stores. Our members commit to reformulation and New Product Development to encourage people to purchase lower sugar options in order to influence these choices.

3. We will maintain low levels of salt in our products

Since 1998 our members have reduced salt in their products by 64%. We remain committed to keeping levels of salt within our products at minimal levels and to report our data to the Department of Health annually for public scrutiny.

4. We will continue to advertise responsibly

Engaging advertising is an essential means of building awareness of the breakfast cereal category and promoting consumption of products that contain fibre and other important nutrients. In that context, we commit 80% of industry advertising will be focussed on products that are designated under EU law as being either a source of fibre or high in fibre. This would constitute an effective and powerful support for Government policy to promote healthy balanced diets.

The UK CAP and BCAP Codes are among the strictest regulatory frameworks for advertising anywhere in the world. Breakfast Cereal UK members are committed to invest in advertising their products in line with these standards. Breakfast Cereals UK members will not target under 16s with any advertising, or communication, online or offline, that encourages the consumption of products designated as HFSS under the current UK Nutrient profiling model.

5. We will make it easier for people to understand the nutritional content of our products.

We commit that by the end of 2021, all Breakfast Cereals UK members will use colour coded front of pack labelling on all branded Ready to Eat breakfast cereal products sold in the UK.

Our Asks from Government

1. A strategy for promoting fibre and whole grain intake, supported by measurable targets.

Public Health England has focussed extensively on reducing free sugars intakes, their latest data indicates that the average fibre intake in adults is 19g per day, well below the recommended 30g per day. We call on Government to set out a clear strategy for promoting the increased consumption of fibre and whole grains to the UK population with measurable targets, similar to those set out as part of their sugars reduction strategy.

2. A holistic and evidence based approach to policy making.

We support holistic Government policy to address public health based upon independent evidence that considers the likely policy outcomes, the regulatory context and potential unintended consequences. For example, breakfast cereal producers are currently subject to EU regulation that prevents them from using certain sweeteners in their products. While such restrictions remain, the options for sugar reformulation are limited and constrained on the basis of the need for consumers to gradually adapt to changes in the taste of their food.

3. Recognition of the importance of breakfast and policies to encourage all children to eat a healthy meal at the start of the day.

Evidence shows that approximately 16% of teenage children do not eat any breakfast, and approximately 2-3% typically consume crisps or confectionery before school. The UK Government has focussed heavily on promoting the consumption of healthy breakfasts in school. We call on Government to see our industry as a committed and collaborative partner to promote healthy breakfast choices to children.

4. A pragmatic approach in relation to advertising that recognises the benefits of industry promoting high fibre and nutrient rich foods.

We call on Government to recognise and incentivise industry investment in products that promote positive health. We ask Government to take a pragmatic approach to promote healthier choices to the population; in particular, acknowledging the benefits of industry advertising investment. A restrictive regulatory environment risks exacerbating the current decline in sales of branded breakfast cereals and result in a decrease in fibre and micronutrient intakes. According to modelling undertaken by Public Health England, for example, if the draft UK Nutrient Profiling model is implemented as proposed, it would impose restrictions on advertising to 82% of breakfast cereals that are also defined as being 'High Fibre' under EU regulations. These restrictions would now extend to a ban on all advertising on the Transport for London Estate (including the London Underground.)

5. Recognition of the positive intention of breakfast cereal manufacturers to address public health issues in relation to their products.

We request the UK Government works in partnership with our members to facilitate positive engagement with the public on issues pertaining to nutrition, public health and the environment as part of any future National Food Strategy. Breakfast Cereals UK Members have reduced salt in their products by 64% since 1998 and added sugars by 19.9% since 2010. Evidence from our reformulation programmes clearly shows that our members are committed to taking voluntary action in support of the UK Government's broader public health policy programme.



Case Studies



Dorset Cereals

During 2019 Dorset Cereals undertook a major reformulation programme to remove added sugar from 9 of its 10 UK muesli products. At the same time they changed all their UK packaging to feature traffic light labels prominently on the front.



Jordans Cereals

Jordans cereals removed all added salt from their products in 2009 and have cut added sugar from their baked cereals range by 14% over the past 5 years. The business also works with UK farmers to promote biodiversity on conjunction with experts from The Wildlife Trusts and Linking Farming and the Environment (LEAF).



Kellogg's

Kellogg's has been supporting school breakfast clubs in the UK since 1998. By providing everything from cash grants to free bowls and food, they have enabled more than 3000 Breakfast Clubs to open their doors to feed children in the morning. The growth and success of these clubs is a testament to the benefits they bring including attendance, attainment, alleviating hunger and providing pre-school care.



Mornflake

Mornflake oats contain no added salt or sugar. Mornflake cereal ingredients are sourced exclusively from UK farmers and the Company has supported UK agriculture through its sourcing programs for over 50 years. Their UK manufactured products are exported to over 70 countries worldwide.



Nestlé Breakfast Cereals range

Cereal Partners Worldwide UK have reformulated a range of their Nestlé breakfast cereals to remove sugars. Results include a reduction in sugars in Original Shreddies by 16.1%. This is expected to reduce the Nestlé Breakfast Cereals sales weighted average for sugars per 100g by 3%, removing 330 tonnes of sugars annually.



Weetabix

Weetabix Food Company branded cereals are high in fibre, low in salt with no red front of pack traffic lights, but have continued to make improvements in nutrition. This is shown by the reduction sales weighted average for sugar by over 18% over the last 4 years (equivalent to over 2000 tonnes less sugar in this period for branded cereals).



Afterword

The members of Breakfast Cereals UK (BCUK) recognise the important role they play, both within the food and drink supply chain and in relation to societal responsibilities and their local communities. Member companies have both industry and individual commitments to support government in meeting its targets across wide ranging policy areas including health and nutrition, environmental sustainability, agriculture and farming, plastics and packaging, energy use and food waste.

As members of the Food and Drink Federation, the BCUK companies are actively engaged in supporting the initiatives of FDF's Environmental Ambition 2025.

Food waste has been in the spotlight recently, and the first progress report for the UK Food Waste Reduction Roadmap showed a significant increase in business commitment. Food and drink manufacturers also made a significant contribution to the progress recorded in the first Courtauld 2025 milestone report, a reduction in food waste by 15.9% per capita was achieved between 2015 and 2018, and by 31.4% per capita basis since 2011 against the UN Sustainable Development Goal 12.3 target baseline. Courtauld 2025 aims to cut the resources needed to provide food and drink by 20% by 2025.

Since 2019, FDF members have reported reductions in CO2 emissions, down 53.2% since 1990, and in water consumption, down 38.5% since 2007.

FDF members have demonstrated progress under several industry initiatives, including the UK Food Waste Reduction Roadmap, and FDF signed the Step up to the Plate Pledge. Our members continue to engage with the UK Plastics Pact and are contributing to a breadth of other actions to tackle plastic waste.





Breakfast Cereals UK

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