



## Research description

Footprint Intelligence was commissioned by Nestlé Professional to conduct a piece of independent research to create a simple and actionable guide to effective product renovation, reformulation and innovation for foodservice. The research for this project comprised of a mix of desk-based research and semi-structured interviews with foodservice experts, as well as other opinion leaders linked to industry. In total, over 60 experts were interviewed. An industry focus group also brought operators, producers and campaigners together to debate the issues. Footprint Intelligence is indebted to the industry experts who generously gave their time and insights for interviews and for the focus group.

## About Footprint Intelligence

With the ever moving and shifting sustainability debate, accurate intelligence enabling businesses to make informed decisions is vital. Footprint Intelligence is Footprint Media Group’s research and analysis division helping companies to develop successful strategies in the context of responsible business practices.

Footprint Intelligence aims to drive, promote and share best practice by helping industry to answer some of the most pressing sustainability questions of our time by taking on the challenge of asking tough questions and finding answers. We use research and industry insight to bring industry together to find workable solutions, revealing the opportunities, trends and challenges.

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## Recipe for change: using reformulation, renovation and innovation to improve health opportunities

Spiralling weights and the high rates of lifestyle-related chronic diseases have led to an increasing focus on foodservice's role in tackling this health crisis<sup>1</sup>. This is because meals and products eaten out of home are a considerable part of the national diet: one in six meals<sup>2</sup>, and one quarter of calories<sup>3</sup> are consumed outside of the home. Thus, reformulating, renovating and being innovative about what is served and sold within foodservice can have an important impact on public health.



In the UK, 63% of the adult population is overweight or obese<sup>4</sup>

Diets high in fat, sugars and salt, and low in fruit and vegetables account for around 30% of all coronary heart disease<sup>6</sup>

Around 5% of all cancers in the UK are linked to excess bodyweight<sup>7</sup>

### The case for action

In the UK, 63% of the adult population is overweight or obese<sup>4</sup> and obesity is a life sentence. It doubles the risk of premature death and significantly increases the risk of dietary/lifestyle-related diseases such as Type 2 diabetes, heart disease, stroke, cancer and depression<sup>5</sup>. According to the World Health Organisation, lifestyle-related diseases are becoming the biggest threat to human health<sup>6</sup>. Poor diets contribute significantly to the onset of lifestyle-related diseases. For example, diets high in fat, sugars and salt, and low in fruit and vegetables account for around 30% of all coronary heart disease<sup>7</sup>, whilst around 5% of all cancers in the UK are linked to excess bodyweight<sup>8</sup>.

### Foodservice as part of the solution

Foodservice can play an important role in helping people to be healthier. A McKinsey report calculated that the reformulation of food products, provision of healthier meals, provision of food labelling and reduction in portion size are four highly effective ways to have a cost effective impact on obesity<sup>9</sup>. A report by the Richmond Group concluded that 25,000 lives could be saved by 2025 through food reformulation, including reducing salt, sugars and portion size<sup>10</sup>.

Many parts of foodservice have embraced the reformulation and renovation agenda, spending considerable time, energy and finance on examining ways to make food healthier. The UK food industry is a world leader in salt reduction, achieving an 11% fall in the population's salt intake between 2005 and 2014<sup>11</sup>. In foodservice, salt and sugars reduction is becoming more common across the sector, with players from contract caterers and high street restaurant chains to drinks manufacturers and bread suppliers revising their formulations and recipes.

The leaders in the foodservice industry have been working hard to cut calories and improve the nutritional profiles of their products in other ways too. These include switching from frying to baking, changing oils and cooking techniques as well as experimenting with new ingredients and combinations. Renovation, such as re-closable packaging, smaller pack sizes and labelling, is also on the increase, whilst innovation in new products, ingredients and menus, especially from newer players, is encouraging the industry to think creatively and find imaginative solutions.

### Improving health, helping business

Taking action also leads to commercial opportunity. Consumers want to improve their health<sup>12,13</sup>, and research<sup>14</sup> by Footprint Intelligence revealed that taking consideration for impacts on consumer health is starting to be seen as part of foodservice's ethical responsibility. Reformulation offers industry one way to address this, and consumers are happy for food companies to change the recipe of products to make them healthier, as long as they still taste good<sup>15</sup>.

Health and ethics are integral to sustainability credentials, and the increasing importance consumers are placing on sustainability is reflected in consumer purchasing patterns too. An international study<sup>16</sup> by Unilever revealed that a third of consumers (33%) are now choosing to buy from brands they believe are doing good socially or environmentally. It estimates that a €966 billion opportunity exists for brands that make their sustainability credentials clear.

Health matters to consumers. The FSA's Consumer Tracker found that 55% of consumers said the amount of sugars, 45% the amount of salt, and 41% the amount of fat in food were issues of concern<sup>17</sup>. Another survey found that, in the last year<sup>18</sup>, 50% of respondents said they had been on a diet and 46% had tried to be healthy<sup>19</sup>. Salads are even overtaking fish and chips on pub menus<sup>20</sup>.

Product renovation, reformulation and innovation provide the opportunity to make healthier choices more accessible, and more widespread, giving the food industry the power to have a positive influence on consumer health.

### Recipe for change

Based on in-depth industry research, the 'Recipe for change' is a clear and actionable non-technical guide to successful product renovation, reformulation and innovation. Creating an overarching framework, it shares best practice, research and hard-won insight to help foodservice develop healthier products faster and more effectively.

*"We, in foodservice, have a responsibility to consider the overall health of the population. It's not helpful for healthier products to be sidelined into a niche. If we use reformulation, renovation and innovation to make our products better across the board, ensuring products meet 2017 salt targets for example, it will help a much wider range of people, not just those who buy overtly healthy products."*

**Beth Hooper, Nutrition Manager**  
Nestlé UK&I



# Recipe for change: using reformulation, renovation and innovation to improve health opportunities

**Market on taste**



Keep taste at the heart of both development and branding and be careful of using the word 'healthy' - it turns some consumers off and has regulatory requirements.

**Embrace innovations and innovators**



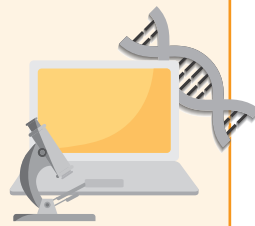
New processes and products show what can be done, so get involved, and get your buyers behind the health agenda, or get left behind.

**Think health across products and markets**



Pitch healthier products created for one market to others - do not be constrained by whether certain sectors or demographics are perceived to be interested in health.

**Be evidence based**



Base reformulations on current scientific knowledge to ensure changes to existing products result in 'better' products and solutions that can help to improve health.

**Go under the radar**



Making some improvements by stealth makes healthier products the norm for everyone, not just those interested in health.

**Introduce clear, consistent and easy to digest nutritional labelling**




Clear labelling cuts through the cluttered foodservice environment to help consumers make informed food choices.

**Think food, not nutrients**



Focus on food and context, and avoid obsessing over individual nutrients - it can lead to skewed thinking.

**Band together**



Join together with others in industry to force change - from your supply chain to peers and competitors.

**Aim high and set stretching health targets**



Tough targets can make the impossible possible, so set stretching targets and then innovate to get there.

**Keep ahead of your customers**



Meet unrecognised needs and keep ahead of the trends - it provides potential commercial opportunity.

**Be prepared to make investments**



Invest in research and development to find innovative solutions, as making products healthier is rarely a straightforward process of replacing one ingredient with another.

**Work with the media**



Find surprising or counter-intuitive stories and angles associated with the creation of healthier products so media messages help consumers to embrace healthier products.



## 1 Market on taste



Keeping taste at the heart of both development and branding is key as healthier foods can be rejected because of a perception of inferior taste. Research has shown that many people do not believe healthy options to be tasty and can actually expect them to be less tasty, even if they are not<sup>21,22,23,24</sup>. There is also some evidence that health labels appeal the least to those who need healthy options the most. A study of value judgements of healthy food by overweight people and people of a healthy weight found that valuing food as healthy did not influence overweight people to choose the healthy option<sup>25</sup>. Healthy labels can also cause “health halos” which can lead consumers to overeat foods they believe to be healthy, potentially negating any health benefits<sup>26</sup>.

These research findings, as well as market responses, have led some in the food industry to be reluctant to advertise health credentials, such as reductions in sugars, fat and salt, in case the changes are perceived to negatively impact taste, even if they do not. Regulations also have a major impact on the advertising of reformulations and improved health credentials. This is because it is only possible to make a claim about a reduction in fat, saturated fat or sugars if it has been reduced by 30%, or by 25% for salt.

However, there is evidence that reformulations to reduce fat, sugars and salt do not always impact customer acceptance in terms of taste<sup>27</sup>. Also, not all consumers are turned off by products that help them to be healthier. One study even showed that participants were actually prepared to pay 12% more for the healthier version of some of the tested products<sup>28</sup>. Another showed that consumers were prepared to pay proportionally more for smaller pack sizes to help them with portion control<sup>29</sup>. Reducing the plate size can lead people to see the food as better value, even when there is 15% less food<sup>30</sup>. This indicates that, positioned correctly, healthier products provide commercial opportunity.

### Choose the right words

Choosing the right words when describing healthier products is important because the right descriptors can dramatically impact sales – managing to communicate health without turning off people who think healthy will not be tasty<sup>31</sup>. This is, of course, contingent on complying with any relevant regulation over marketing terms for that particular product category. For example, ‘light’ and ‘fresh’ are

#### Blind prejudice

The negative perception of ‘healthy’ can affect everyone from the customer to the chefs, food technologists, sales teams, managers and clients involved in designing and approving healthier products. Blind taste tests are therefore crucial.

“When we first moved to reduced salt and sugar in baked beans,” explains one industry insider, “we tested it with the chefs, and they all hated it because they didn’t expect it to taste good. So we tested it again, but this time we didn’t tell them that one of the samples was a reduced salt and sugar version, and this time the healthier beans came top.”

words which are positively associated with health<sup>32</sup>; but to use these descriptors, the product or meal must comply with the regulatory conditions for use. The target audience must also be considered – ‘light’ would not work when promoting products or dishes to demographics looking for satisfying portions, instead using ‘generous’ or similar terms to describe substantial offerings can ensure that health attributes are not seen as a turn off.

Foodservice insiders agree. One contract caterer admitted, “We have a lot of insight from market research, and what we’re hearing is that as soon as people hear an item is healthy – it discourages them. Words like ‘fresh’ are positive – people link it to health but are not turned off by it. So these types of words are the ones we use.”

## 2 Go under the radar...

Making improvements by stealth makes healthier products the norm so that the largest number of people can benefit without risking consumer acceptance. A slow, stealthy approach is also best when it comes to issues such as salt and portion size as consumers are more likely to accept gradual reformulations and reductions rather than dramatic ones.



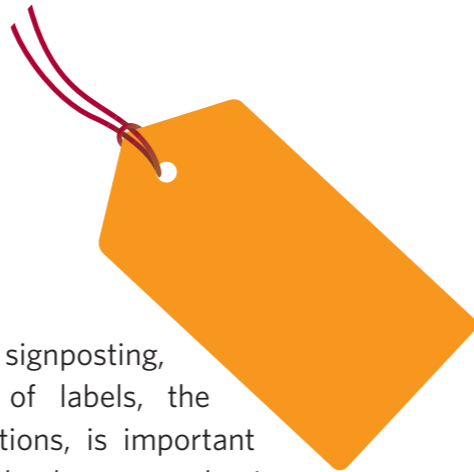
This is because incremental changes allow expectations and palettes to adjust gradually, whilst noticeable changes might be perceived as changing the flavour or texture of a favourite dish or product.

Foodservice has found many innovative ways to improve the health credentials of products without consumers really noticing. Many are relatively quick and easy wins which industry insiders report have little impact on taste or customer satisfaction, such as reducing the sugars in desserts, stopping chefs from adding salt when cooking, exchanging tinned fish in brine/oil to spring water or training chefs to bash deep fat fryer trays to reduce the amount of fat absorbed. Others, such as changing the composition of dishes to focus on a higher proportion of whole grains and vegetables (including vegetable proteins) to change the nutritional profile require more effort, but can still be done whilst maintaining customer satisfaction.

For example, Tate and Lyle Sugars reduced its sugar stick portion size with no noticeable impact on sales volumes. This indicated that consumers continued to use the same number of sachets as before, without compensating for the fact that each contained less sugar. Nestlé Professional has continued to meet internal targets for the reduction of sugars, fat and salt for products like mash potatoes and bouillons in 2016, often via small, gradual changes, whilst Charlton House have lowered the salt in 1,500 products – all without any significant impact on customer satisfaction.

It is also worth making health-related changes when addressing other consumer demands, such as the desire for a cleaner ingredients deck – that is, using well-known ingredients – or enhanced flavour or texture. In these cases, consumers usually embrace a more noticeable product change more readily because they are supportive of a modification being made. In some instances, providing consumers with more choice by introducing an improved range alongside the old range can also be effective, and may even allow more drastic changes to be introduced.

### 3 Introduce clear, consistent and easy to digest nutritional labelling



Clear, consistent and compliant nutritional labelling and signposting, which can often be discrete such as the introduction of labels, the inclusion of symbols, or the use of health-invoking descriptions, is important to help consumers understand what is in the food they are buying. This may sound contradictory with point 1: **Market on taste**, and point 2: **Go under the radar**, but good, clear labelling enables consumers to take greater responsibility for their food choices. Well-designed labelling systems can inform consumers' choices without turning off those consumers who are wary of healthier products (for an example, see box **Clear and simple**).

This labelling must also be consistent within a specific outlet or organisation. This sounds obvious, but even major chains have been found to attribute different calorific values to the same product in different places – such as on menu boards and tray liners.

Clear labelling is especially important in the cluttered foodservice environment where people often have very limited time, and health is not necessarily their top purchasing criteria. This means messages need to be communicated quickly and clearly. Messaging does not necessarily have to be on the menu or product though – there are lots of creative ways to communicate. For example, Nestlé Professional has in its range an interactive coffee machine that displays the calorie content of the particular drink chosen, depending on the specific choices that an individual consumer has made (e.g. a large latte with semi-skimmed vs. skimmed milk).

Voluntary front-of-pack labelling for pre-packaged goods – especially in the form of the Government's hybrid front of pack labelling scheme – has made it easier for consumers to identify healthier options for these product ranges. But in restaurants and outlets, the identification of healthier menu options is not yet widespread and signposting information is often poor. Yet it should become the norm.

*“Customers have a short period of time, say 30 minutes, to enter our restaurants, look at menus, eat, and go back to work. Health messaging can be extremely confusing, and people can see it as wallpaper. Although of course we run larger, health-related campaigns, we use a lot of quick-logo-like messages, such as calorie labelling and colour coding. This is because logo-type messages are more easily digested in the crowded foodservice environment.”*

**Wan Mak, Head of Nutrition and Dietetics, Sodexo UK & I**

Successful labelling strategies include:

- using health-related descriptors on the menu to signal healthier dishes, even if this is done subtly
- identifying options that are under a certain calorie cap (typically 600kcal for main meals)
- picking out particular nutrients, such as being high-fibre or low-fat when this is appropriate to claim
- using simple identification systems such as traffic light colour coding or icons for dishes or food items
- signposting healthy ranges which offer an overall, balanced meal, without requiring the consumer to make too many value judgements or have too much knowledge about which health attributes they want to prioritise.

#### Clear and simple

Simple systems work best. Dine Contract Catering have had success making healthier options easier and more understandable to consumers by giving dishes and some food items a one, two or three healthy heart rating, with three hearts being the healthiest.

### 4 Aim high and set stretching health targets



Tough targets can make the impossible possible, so set stretching targets and then innovate to get there. The scale of the health crisis demands it. The transformation and turn around in the breadth and range of free-from products shows what is possible when industry is motivated/pushed to change – in this case by legislation which required allergen information to be provided for foods sold non-packed or pre-packed for direct sale. What is interesting however, is that having a hard target meant many in industry went further. For example, companies such as Nestlé Professional, Unilever and Bidvest Foodservice worked hard to make the breadth of their free-from offering and their ability to help clients understand and navigate the new legislation a unique selling point.

#### Making tough targets work

Sodexo UK & I set itself the challenge of creating meals that were healthier for both people, and planet, without compromising on taste or costing more. The 'Green & Lean' range, which commits to using seasonal fruit and vegetables, whole grains, higher welfare meat, no added salt, lower fat dairy products, and standard portion sizes, has been very well received and is now being rolled out more widely. The project has required considerable imagination and commitment. But by thinking creatively – for example, to turn a fried breakfast into a breakfast burrito to reduce the amount of processed meats and fried ingredients whilst upping vegetable content and creating big flavours – it is possible to reformulate whilst keeping customers satisfied.

Jamie's Italian also set itself a target of reformulating its menu to ensure that one third of all starters and mains courses met strict nutritional criteria. For a main course, that has been specified as containing less than 35% of an adult's Reference Intake (RI) for calories and saturated fat, and less than 25% of an adult's RI for salt<sup>33</sup> It has also reduced the sugars in desserts by up to 34%<sup>34</sup>, introduced a smaller portion for its pasta dishes; and two sizes of children's meals to cater for the two-year-old versus 12 year-old appetites.



## 5 Embrace innovations and innovators

Manufacturers and operators must embrace the challenge presented by new products, processes and ranges as a wake up call to keep flexible and keep innovating. From seaweed and insect protein to healthy hot vending and sustainable meals, a raft of innovative products, often from start ups but also from established players, are carving a new way forward, acting as drivers for larger companies to reformulate and showing what is possible if only foodservice is prepared to give them a try.

Buyers must also be briefed about emerging trends and products so that they understand the importance of prioritising healthier products. This is because there can be a disconnect between the health focus of the menu development team, and the prioritisation of buyers on other issues – such as price, the comfort of a known product or a lack of understanding of what product differences mean in practice.



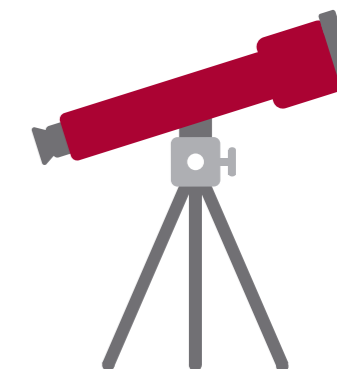
*“We’ve worked really hard to create great tasting reduced salt ham and bacon, and to also launch a nitrate-free ham. But whilst customers and nutrition teams seem extremely supportive of our healthier products, unfortunately health does not seem to be the main priority on the buyers’ agenda.”*

**Nigel Wagstaff, Director, Houghton Hams**

## 6 Keep ahead of your customers

Customers are sometimes the last to realise that they want or need a product until it is available. Meeting those unrecognised needs and spotting agendas that might have an influence on future consumer demand and trends are key to staying ahead of the game.

There can also be a disconnect between what the consumer wants and what operators think they want, and therefore what the operator promotes or markets. So, for example, consumers may be asking for flavoured coffees made with sugar-free syrups, but if operators have not identified the trend, they may not prioritise marketing or stocking lower sugars options.



## 7 Think health across products and markets

Pitch healthier products created for one market to others. Do not be constrained by whether certain sectors or demographics are perceived to be interested in health – offer healthy ranges to them anyway. Standards, such as the Government Buying Standards for Food and Catering Services (GBSF), are driving health-related innovations for the public sector, but products can be popular elsewhere.

“There is a real opportunity for cross-selling reformulated products into the private sector which can sometimes be missed,” explains David Jones, Director of Technical Services, Bidvest Foodservice. “But we take a view that anything we supply for the public sector is available for the private sector, because the private sector is evolving and wants these things now too.”

Smaller manufacturers in particular can sometimes be blind to this opportunity. As an example, one pizza manufacturer at an education-sector trade show spent several minutes explaining how testers and consumers loved its healthier pizza base, which had been formulated for the school food market, as much as its regular pizza base and could not really tell the difference. Yet when asked whether this meant they offered the healthier base to other, non-school customers, the response was a surprised “no”, because “regular” customers “would not be interested”.



## 8 Be prepared to make investments

Invest in research and development to find innovative solutions, as reformulation is rarely a straightforward replacement of one ingredient with another. Instead, it often requires a complete assessment of product formulation to get the same texture, flavour, microbial stability and visual impact. In particular, salt and sugars reduction have potential implications for structure, food safety and shelf life. It can also be hard to find replacement ingredients that will not increase calories.



Reformulation can also have consequences for production. Take dough for example. Whilst salt's properties as a flavour enhancer can often be compensated for in many recipes, removing salt from dough creates a stickier dough. This can lead to more dough being wasted in the manufacturing process and problems with machinery.

From research and design to more expensive ingredients, new packaging design and manufacturing machinery, reformulation and renovation often calls for investment. And sometimes this investment, such as investing in new confectionery moulds to reduce portion size, has to be justified using a moral, rather than financial, business case as changes may go unnoticed by consumers.

"We've committed to ensuring all multi-serve products are re-closable by the end of 2017 to support customers in portion control," explains Katie Ayling, Nutrition Manager, Nestlé UK & I. "It is hard for the business because it requires a lot of investment, in packaging, design etc., but it won't necessarily drive sales. Instead, the business case is that re-closable packs are a small, but important, step to enable consumers to develop healthier consumption habits, so it's our responsibility to do it."

## 9 Be evidence based

Food trends come and go – but in foodservice, reformulation must be based on current scientific knowledge to ensure changes to existing products result in 'better' products and solutions that can help to improve health. Nutritional thinking continues to evolve so keeping up to date is important.



Ensuring reformulation decisions are evidence based tends to be less of an issue for larger organisations who have their own nutrition teams, but smaller producers and operators often do not. This may mean that those designing menus and recipes, such as chefs, may not have nutritional qualifications, and decisions may be based on historical assumptions or media stories which do not necessarily present a rounded view.

Basing policy and reformulations on sound science is crucial but with new, and often contradictory, research being reported in the media all the time, it is necessary to look behind the headlines to be discerning about the weight given to each piece of evidence. This will depend on the quality of the research and who commissioned it and questions to consider could include: is this information from a credible source (such as the UK Government or quality journal); has the evidence been peer reviewed; how large was the study; was there a control; could the authors/sponsors have any bias or conflicts of interest<sup>35</sup> and are the findings presented in context?

With industry working hard to cut out nutrients identified as undesirable and incorporate those viewed as desirable, it is crucial to have quality scientific evidence underpinning the changes to ensure that one 'problem nutrient' is not unwittingly replaced with another.

Science also has the capacity to pinpoint valuable areas for research and development, and help frame efforts. For example, studies have shown how foods, ingredients and dietary patterns can enhance satiation and satiety, and this can be applied to products to help with the control of bodyweight<sup>36</sup>.

## 10 Think food, not nutrients

Focus on food and context, and avoid obsessing over individual nutrients. Whilst it can be helpful to identify nutrients of concern, viewing certain nutrients, ingredients and foods in isolation and not in context is called "nutritionism" and can narrow focus too much. As New York University Nutritionist Marion Nestle said, "It takes the nutrient out of the context of food, the food out of the context of diet and the diet out of the context of lifestyle."<sup>37</sup>



Scientists might want to focus on one nutrient because they need individual variables they can isolate, but in practice this kind of reductionism can be misleading. And food and the context in which food is eaten, affects its nutritional impact – in the way that drinking tea alongside a steak will interfere with iron absorption, while drinking a glass of orange juice could improve absorption.

To really encourage healthier food choices, and therefore a healthier population, food must be seen in the context in which it is eaten, with consumers educated and enabled to understand that it is the overall balance of what they put into their mouth that matters.



### Making tough targets work

The Nestlé Nutritional Profiling System aims to measure and improve nutrition in context. It takes into account different food categories (i.e. meals, snacks), how people eat their food and different nutritional needs based on age. This helps to identify which foods to reformulate for the greatest health impact - with sodium and total sugars content reduced by up to 22% and 31% respectively for the eight most widely purchased food categories, and total energy reduced by over 10% - all whilst portion sizes remained unchanged<sup>38</sup>. It also has a unique algorithm that prevents unhealthy food being re-classified as healthy just because it has had desirable nutrients added to it.

## 11 Band together

Join together with others in industry to force change. Teaming up with other players from other parts of the supply chain, and even with competitors, is an important way for industry to drive change. This is across the board, from manufacturers agreeing to work to the same targets to operators coming together to ask suppliers to change their formulations and ingredient mix.



When it comes to the supply chain, coming together to lobby suppliers is especially powerful as even major players report that their buying power for a particular product may not be enough on its own to persuade some manufacturers to change their processes.

## 12 Work with the media

Find surprising or counter-intuitive stories and angles associated with the creation of healthier products - the media are drawn to stories like these, so demonstrate how reformulated products meet these criteria but from a health perspective. Then, work with press contacts to ensure they understand the health motivation behind initiatives such as portion reduction so that the media and industry can work together to help improve public health.



“We need to get the media working with us to help tackle public health, rather than seeing reductions in portion sizes as a rip off or reformulations as nanny state,” says Amada Ursell, Nutrition Editor of *Healthy Food Guide* magazine. “Controversial, surprising and counterintuitive stories sell. The trick is to find the positive health angles that surprise and generate interest, and communicate them. Then the media can work with us in supporting the health agenda instead of working against us.”

Things like the Soil Association’s Out to Lunch campaign do this well because they satisfy the media’s desire to both shame and celebrate in a format that enables health-related messages to be transmitted, such as the reliance on processed food and the lack of fresh fruit in children’s

lunchboxes. It also enables the sharing of best practice with many stories including detail on the top ranked foodservice offerings<sup>39</sup>.

### Thank you

Our thanks go to those who generously gave their time and insights for in depth interviews and at the focus group. Our thanks also go to those who didn’t wish to be credited.

- |   |  |
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