

The Consumer Voice in Europe

FOOD COMPOSITION & THE INTERNAL MARKET

A cross-country comparison exercise by BEUC members



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Why it matters to consumers

To make the healthy choice the easy choice, high-quality nutritious food and drink should become the rule, not the exception. Food companies across the EU have committed to reformulate their products to improve people's diet.

However it is not clear when and why companies sell different or identical food and drink, nutrition wise, to different countries.

17 BEUC members have carried out a small-scale shopping exercise looking into food businesses practices by checking the nutrition composition of 9 everyday food and drink products.

Summary

*This document reflects a shopping exercise **17 BEUC members**¹ carried out **between December 2015 and January 2016**. They collected labels on **10 everyday food and drink products** in 17 EU member States to check whether they contained **diverging amounts of salt, sugar and fat from one country to another**.*

*Products were classified in three different categories: **divergent nutritional composition** (category 1), **slightly different nutritional composition** (category 2) and **identical nutritional composition** (category 3).*

***Major differences in sugar content were found for the soda sample** with levels doubling from one country to another, partly due to the substitution with artificial sweeteners in some regular sodas.*

*Three products – the yoghurt, the instant hot beverage and one of the breakfast cereals – were found to contain slightly different amounts of fat, saturated fat, sugar and salt. It was found that **companies sell slightly healthier versions of their products to certain EU countries** and that products lower levels of sugar were not automatically higher in fat or salt and vice versa.*

*Eventually **two products, the crisps and one of the chocolate bars, were found to contain the exact same amounts of sugar, salt, fat and saturated fat**.*

*BEUC calls for **more transparency to understand the reasons underpinning food companies' reformulation policies**. It will help provide a comprehensive overview of reformulation efforts and **identify opportunities to offer consumers healthier food products across the whole EU**. At the same time **governments must monitor voluntary initiatives and drive the appropriate changes to ensure that reduction targets for salt, added sugars and saturated fat are met**.*

¹ Altroconsumo, CCA, Consumentenbond, Consumers' Organisation of Macedonia, DECO, dTest, Forbrugerrådet Tænk, Forbrukerrådet, FRC, OCU, Sveriges Konsumenter, Test-Achats, UFC Que-Choisir, VZBV, Which ?, ZPS.

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Introduction

To determine whether companies operating across the single market sell different versions of their products to different EU countries, BEUC and 17 of its members carried out a small-scale shopping exercise.

The 10 products collected by BEUC members were randomly selected to represent a typical shopping basket. It covers many different food and drink categories from yoghurts, to breakfast cereals, soda, crisps and ice-cream from a wide variety of food businesses operating across the EU.

For each product, the data was collated so that the levels of nutrients displayed on labels could be compared. Depending on the variations uncovered products were classified in three different categories:

- Category 1: **divergent** nutritional composition;
- Category 2: **slightly different** nutritional composition;
- Category 3: **identical** nutritional composition.

Higher and lower levels are highlighted in red and green in the tables.

Category 1 only contains the **Fanta soda samples** for which **sugar levels vary from 6.9 grams in the UK to 12.7 grams in Cyprus.**

Six products are listed in category 2. Three of them – the yoghurt, the instant hot beverage and one of the breakfast cereals – were found to contain **slightly diverging amounts of sugar, fat and salt.** Three products were found to have **identical nutrition composition except when sold in certain specific countries.**

Category 3 contains the two remaining products, i.e. the chocolate snack and the crisps. They were found to contain **the exact same amounts of sugar, salt and fat in all the surveyed countries.**



BEUC members identified 3 different industry practices:

- 1) Selling many different versions of a same product across the EU;**
- 2) Selling slightly different versions of a same product to a few countries and selling another version to the rest of the EU;**
- 3) Selling the same product to all countries.**

Recommendations

In light of the present results BEUC calls for:

- Food businesses to extend 'best' practices to **ensure all consumers in the EU benefit from better reformulated products.**
- Food companies to commit to establish **clear and measurable targets to reduce levels of sugar, fat and salt** in food and drink products. **Benchmarks accompanied by detailed timelines are urgently needed** to improve people's diet.
- Food businesses to **share food composition data with national and European public health authorities**, including the World Health Organisation, in order to identify areas of success in reformulation and suggestions for improvement.

Products

CATEGORY 1: Divergent nutritional composition

If our research shows that **sugar amounts can double from one country to another**, it is worth highlighting the plethora of different levels of sugar used in the surveyed soft drink. Levels vary from **more than 12 grams to 11 grams, 10 grams, 9 grams, 8 grams and eventually 6 grams**. Products containing less than 9 grams of sugar were found to contain both sugar and sweeteners.

One could think that the same product is sold to neighbouring countries, such as France and Belgium or Sweden and Denmark, but our study shows that this is not the case. Therefore by simply crossing the border, consumers can end up ingesting more or less sugar.

- **Soft drink (*Coca-Cola's Fanta*)**

| | Sugar (grams per 100ml) |
|-----------------------|-----------------------------------|
| Austria | 9 |
| Belgium | 11.7 |
| Cyprus | 12.7 |
| Czech Republic | 9.5 |
| Denmark | 10.6 |
| France | 9.6 |
| Germany | 9.1 |
| Italy | 11.8 |
| Macedonia | 9 |
| Netherlands | 11.7 |
| Norway | 10.6 |
| Portugal | 8.5 |
| Slovenia | 9.5 |
| Spain | 8.5 |
| Sweden | 12.3 |
| Switzerland | 9.6 |
| UK | 6.9 |

CATEGORY 2: Slightly different nutritional composition

The examples depicted in this category clearly show that reformulation does not necessarily mean replacing one nutrient by another. In addition the small variations in terms of sugar, fat and salt contents indicate that there is still room for improvement to align to existing best practices and continue reducing levels of those nutrients in processed food.

Three products – the yoghurt, the instant hot beverage and one of the breakfast cereals – were found to contain **slightly different amounts of fat, saturated fat, sugar and salt**. Interestingly products containing the highest levels of sugar were not necessarily lower in fat or salt and vice versa.

The Fitness breakfast cereal sold in Portugal contains the highest levels of sugar and salt of the batch while the same product sold in Denmark contains the lowest amounts of the same ingredients. Yet levels of fat and saturated fat were found to be identical in both products. Another example is Danone's Activia yoghurt sold in Austria that contains both less sugar and less saturated fat than its equivalent sold in Germany.

In addition, Nestlé's Nesquik sold in Sweden was found to contain 79 grams of sugar while the same product sold in Austria contained 74 grams of sugar. Levels of fat in the two samples were virtually identical. It is worth noting that levels of sugar in Nestlé's Nesquik varied widely across the EU from 74 to 79 grams without any major difference in terms of fat and saturated fat content.

Three products (Magnum, Milka bar and Frosties) were found to contain the exact same amounts of sugar, salt and fat wherever they are sold in the EU, with the exemption of a few countries.

The same Magnum ice-cream was sold to all consumers across the EU, except in Greece and Macedonia. The Greek Magnum ice-cream was found to contain more sugar, fat, saturated fat and salt than the one sold to the rest of the EU while the Macedonian one was found to contain less saturated fat.

It was also found that the Milka bar sold in Greece was lower in sugar but higher in fat than the Milka bar sold to other EU countries. Eventually Kellogg's Frosties sold in Sweden was found to contain 48% less sugar than the product sold to the rest of the EU (i.e. 25 grams instead of 37 grams) while levels of fat, saturated fat and salt were identical.

- **Breakfast cereal for adults (*Nestlé's Fitness*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Fibres (grams per 100g) | Proteins (grams per 100g) | Salt (grams per 100g) |
|---------------------------|-------------------------------------|-----------------------------------|---|---|---|---------------------------------------|
| Cyprus | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Czech Republic | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Denmark | 10.1 | 1.4 | 0.5 | 11 | 9.1 | 0.88 |
| France | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Germany | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Greece | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Italy | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Macedonia | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.1 |
| Norway | 10.1 | 1.4 | 0.5 | 11 | 9.1 | 0.88 |
| Portugal | 12 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Spain | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.14 |
| Sweden | 10.1 | 1.4 | 0.5 | 11 | 9.1 | 0.88 |
| Switzerland | 11.8 | 1.4 | 0.5 | 6.8 | 9.2 | 1.1 |

- **Breakfast cereals for children (*Kellogg's Frosties*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Salt (grams per 100g) | Proteins (grams per 100g) | Fibres (grams per 100g) | Calories (kilocalories per 100g) |
|-----------------------|----------------------------------|--------------------------------|--|---------------------------------|-------------------------------------|-----------------------------------|--|
| Austria | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Belgium | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Cyprus | 37 | 0.6 | 0.1 | 0.8 | 4.5 | <i>(no info)</i> | 375 |
| Czech Republic | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Denmark | 37 | 0.6 | 0.1 | 0.8 | 4.5 | <i>(no info)</i> | 375 |
| France | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Germany | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Italy | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Macedonia | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Netherlands | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Norway | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Portugal | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Spain | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| Sweden | 25 | 0.6 | 0.1 | 0.9 | 6 | 2 | 373 |
| Switzerland | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |
| UK | 37 | 0.6 | 0.1 | 0.8 | 4.5 | 2 | 375 |

- **Chocolate bar (*Mondelez's Milka*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Salt (grams per 100g) | Proteins (grams per 100g) | Fibres (grams per 100g) | Calories (kilocalories per 100g) |
|-----------------------|----------------------------------|--------------------------------|--|---------------------------------|-------------------------------------|-----------------------------------|--|
| Austria | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Belgium | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Czech Republic | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| France | 58 | 29.5 | 17.5 | 0.43 | 6.5 | 1.9 | 535 |
| Greece | 51 | 35.5 | 16 | 0.38 | 7.5 | 1.9 | 550 |
| Italy | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Netherlands | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Portugal | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Spain | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |
| Switzerland | 58 | 29.5 | 17.5 | 0.43 | 6.4 | 1.8 | 530 |

- **Ice-cream (*Unilever's Magnum*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Proteins (grams per 100g) | Salt (grams per 100g) |
|---------------------------|-------------------------------------|-----------------------------------|---|--|------------------------------------|
| Austria | 27 | 19 | 14 | 3.6 | 0.13 |
| Belgium | 27 | 19 | 14 | 3.6 | 0.13 |
| Czech Republic | 27 | 19 | 14 | 3.6 | 0.13 |
| Denmark | 27 | 19 | 14 | 3.6 | 0.13 |
| France | 27 | 19 | 14 | 3.5 | 0.13 |
| Germany | 27 | 19 | 14 | 3.5 | 0.13 |
| Greece | 29 | 22 | 16 | 3.7 | 0.15 |
| Italy | 27 | 19 | 14 | 3.6 | 0.13 |
| Macedonia | 27 | 19 | 12 | 3.5 | 0.09 |
| Netherlands | 27 | 19 | 14 | 3.6 | 0.13 |
| Portugal | 27 | 19 | 14 | 3.6 | 0.13 |
| Spain | 27 | 19 | 14 | 3.6 | 0.13 |
| Sweden | 27 | 19 | 14 | 3.6 | 0.13 |
| Switzerland | 27 | 19 | 14 | 3.6 | 0.13 |
| UK | 27 | 19 | 14 | 3.6 | 0.13 |

- **Instant hot beverage (*Nestlé's Nesquik*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Fibres (grams per 100g) | Proteins (grams per 100g) | Salt (grams per 100g) |
|---------------------------|-------------------------------------|-----------------------------------|---|---|---|---------------------------------------|
| Austria | 74 | 3.6 | 1.5 | 6.5 | 4.6 | 0.5 |
| Belgium | 75 | 3 | 1.5 | 6.5 | 5 | 0.4 |
| Cyprus | 76.7 | 3.2 | 1.4 | 6.2 | 5.1 | 0.33 |
| Czech Republic | 74 | 3.6 | 1.5 | 6.5 | 4.6 | 0.5 |
| Denmark | 78 | 3.1 | 1.5 | 6.8 | 4.5 | 0.38 |
| Germany | 76.2 | 3.1 | 1.5 | 6.9 | 4.5 | 0.42 |
| Greece | 75 | 3 | 1.5 | 6.5 | 5 | 0.4 |
| Italy | 75 | 3 | 1.5 | 6.5 | 5 | 0.4 |
| Macedonia | 74 | 3.6 | 1.5 | 6.5 | 4.6 | 0.5 |
| Netherlands | 76.7 | 3 | 1.4 | 6.2 | 5.1 | 0.3 |
| Norway | 78 | 3.1 | 1.5 | 6.8 | 4.5 | 0.38 |
| Portugal | 75.7 | 3.6 | 1.6 | 7.2 | 4.8 | 0.34 |
| Spain | 75.7 | 3.6 | 1.6 | 7.2 | 4.8 | 0.3 |
| Sweden | 79 | 3.4 | 1.4 | 6 | 4.2 | 0.40 |
| Switzerland | 75 | 3 | 1.5 | 6.5 | 5.0 | 0.4 |
| UK | 76.7 | 3.2 | 1.4 | 6.2 | 5.1 | 0.3 |

- **Yogurt (*Danone's Activia*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturates (grams per 100g) | Salt (grams per 100g) | Proteins (grams per 100g) | Calories (kilocalories per 100g) |
|---------------------------|--|--------------------------------------|---|---------------------------------------|---|---|
| Austria | 12.8 | 2.7 | 1.7 | 0.14 | 3.6 | 94 |
| Belgium | 13.3 | 3.3 | 2.3 | 0.13 | 3.6 | 99 |
| Czech Republic | 13 | 2.7 | 1.7 | 0.14 | 3.6 | 94 |
| France | 13 | 3.3 | 2.3 | 0.12 | 3.3 | 96 |
| Germany | 13.6 | 2.8 | 1.8 | 0.15 | 3.7 | 95 |
| Greece | 13.4 | 2 | 1.3 | 0.175 | 4.8 | 94 |
| Italy | 12.9 | 3.4 | 2.1 | 0.11 | 3.2 | 97 |
| Netherlands | 13.3 | 3.3 | 2.3 | 0.13 | 3.6 | 99 |
| Norway | 12.8 | 2.7 | 1.7 | 0.14 | 3.6 | 94 |
| Spain | 12.8 | 3.2 | 2 | 0.1 | 3.6 | 99 |
| Sweden | 12.8 | 2.7 | 1.7 | 0.14 | 3.6 | 94 |
| Switzerland | 13.6 | 2.8 | 1.8 | 0.15 | 3.7 | 95 |
| UK | 13 | 3.3 | 2.3 | 0.12 | 3.3 | 96 |

CATEGORY 3: Identical nutritional composition

Kellogg's Pringles as well as Ferrero's Kinder were found to contain the exact same amounts of sugar, salt, fat and saturated fat.

This means that reducing salt, sugar and saturated fat levels in the basic recipe would **allow all EU consumers to access the same healthier reformulated product.**

- **Chocolate snack (*Ferrero's Kinder*)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Proteins (grams per 100g) | Salt (grams per 100g) |
|--------------------|-------------------------------------|-----------------------------------|---|--|------------------------------------|
| Austria | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Belgium | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Cyprus | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Denmark | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| France | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Germany | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Greece | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Italy | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Macedonia | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Netherlands | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Portugal | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Spain | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| Switzerland | 53.3 | 35 | 22.6 | 8.7 | 0.313 |
| UK | 53.3 | 35 | 22.6 | 8.7 | 0.313 |

- **Crisps (Kellogg's Pringles)**

| | Sugar (grams per 100g) | Fat (grams per 100g) | Saturated fat (grams per 100g) | Fibres (grams per 100g) | Proteins (grams per 100g) | Salt (grams per 100g) |
|---------------------------|-------------------------------------|-----------------------------------|---|--------------------------------------|---|---------------------------------------|
| Austria | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Belgium | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Cyprus | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Czech Republic | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Denmark | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| France | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Germany | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Italy | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Macedonia | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Netherlands | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Norway | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Portugal | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Spain | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Sweden | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |
| Switzerland | 1.4 | 33 | 3.4 | 2.6 | 3.8 | 1.4 |

Conclusion

This shopping exercise outlines **the wide variety of food composition practices developed by food and drink businesses across the EU**. Although they operate across a single food market, they do not all adopt a single distribution strategy.

Our 17 members found that companies can either:


- sell different versions of a same product in different EU countries (category 1);
- only sell a different version to a few countries while selling the same product to the rest of the EU (category 2);
- sell the exact same product across the EU (category 3).

It means that **in some cases consumers are offered the exact same product, wherever they live in the EU, while in other cases they are offered a different product, i.e. different nutrition values**. The simple fact that consumers live in France, Spain, Cyprus or Czech Republic can have an impact on the nutritional composition of the products they are offered.

BEUC believes that it is unacceptable that one given company sells a product with more salt, sugar and fat in some countries while it sells a healthier version to other EU countries. Consumers have the right to access the healthiest available products wherever they live in the EU.

At the same time the fact **that companies sell the same product, to all or almost all EU countries, is not necessarily good news**. Indeed some products, , especially those marketed to children and bearing front-of-pack nutrition claims , contain massive amounts of sugar wherever they are sold in the EU. We call on food companies to improve their reformulation efforts to offer healthier options to all consumers across the EU. Companies should support governments' oversight over voluntary reformulation programmes as it guarantees that they are relevant, adequate and effective.

END



Companies should explain why they sometimes sell different products to different countries while in other cases they sell identical products to all EU countries.



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