

# Global Update on Nutrition Labelling

The 2017 edition



With contributions from:

**CFIC** - China Food Information Center  
**CISAN** - Consejo para la Información sobre Seguridad de Alimentos y Nutrición  
**IFIC** - International Food Information Council  
**NZ** - New Zealand Nutrition Foundation  
**SAAFoST** - South African Association of Food Science and Technology

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# Executive summary

*Nutrition labelling is the provision of information about the nutritional content of individual food products. It is most commonly applied to pre-packaged food and beverage products, but comes in a variety of formats. Variables include: the type and number of nutrients labelled, the reference values used, whether the information appears on front-of-pack (FOP) or back-of-pack (BOP) and whether the label gives any interpretative guidance to the consumer.*

The rise of overweight and obesity has focused policymakers' attention on the provision of nutrition information as it is hailed as an important instrument in promoting healthier eating habits. In some countries, government regulations for nutrition labelling have been in place for many years; others have only recently developed a statutory framework for the provision of nutrition information. In both circumstances, the provision of nutrition information on the FOP is becoming an increasingly prominent policy issue. Meanwhile, voluntary FOP nutrition labelling initiatives proliferate.

A number of studies in recent years have examined how consumers perceive and use nutrition labels and assessed consumer preferences for different nutrition labelling schemes. This Global Update seeks to provide a comprehensive overview of the state of play on the issue today: What are the major nutrition labelling initiatives adopted or in the pipeline to date? How do they work? What do the various stakeholders say? Where is the debate heading? What does the research show? The key objectives are as follows:

- To give an up-to-date, comprehensive snapshot of the situation worldwide.
- To evaluate research and practical experiences to date, so as to identify examples of best practice.
- To highlight emerging trends and remaining knowledge gaps.
- To suggest ways forward, particularly with respect to consumer research.

## Snapshot of global trends

At the national level, countries can be grouped into two broad categories based on their statutory regulations on BOP nutrition labelling:

### 1. Mandatory

Those which make nutrition labelling mandatory (**United States (U.S.), Canada, Mexico, Argentina, Brazil, Chile, Colombia, Ecuador, Paraguay, Uruguay, European Union (EU) Member States, Russia, Israel, Gulf Cooperation Council Members, Nigeria, India, Hong Kong, China, Japan, South Korea, Malaysia, Taiwan, Thailand, Philippines, Indonesia, Vietnam, Australia and New Zealand**), even in the absence of a nutrition or health claim. They define which nutrients must be listed and on what basis (e.g. per 100 g/per serving). They also allow voluntary initiatives to provide additional nutrition information.

### 2. Voluntary

Those which provide state-sponsored guidelines to be followed voluntarily (**Venezuela, Turkey, Switzerland, Morocco, Lebanon, Jordan, Singapore, Brunei, Myanmar, Vietnam, Kenya, Mauritius and South Africa**). They define which nutrients should be listed and on what basis, but labelling is not mandatory unless a health or nutrition claim is made or unless the food is for special dietary uses.

## Mandatory nutrition labelling trend

In recent years, the global trend has been a move toward mandatory nutrition labelling regardless of whether a health or nutrition claim is made. In reflection of this trend, the Codex guidelines were amended in 2012 to recommend that nutrition labelling should be mandatory even in the absence of health claims (Codex Alimentarius Commission, 2012). In addition, many countries that had a voluntary approach to nutrition labelling have adopted measures to make nutrition labelling mandatory. The **EU, China, Japan, Indonesia, the Philippines, Vietnam, Nigeria and Saudi Arabia** have all moved in this direction

The inconsistent presence of nutrition labelling on food and drink products fuelled the European debate. An EU-funded research project, **FLABEL**, found that in the 27 **EU** Member States and **Turkey** 85% of products in five product categories carried BOP labels and 48% carried FOP labels (Storcksdieck genannt Bonsmann et al., 2010). 84% of products displayed information in a tabular or linear format, while only 1% displayed health logos.

Among FOP schemes, Guideline Daily Amounts (GDAs) and nutrition claims were most widespread, but both the prevalence of labelling and the type of label varied by country. A similar situation has developed in Asia, with a wide variety of labelling formats in place and an emerging trend toward standardisation, particularly in **ASEAN** countries. In this regard, Codex Alimentarius guidelines are often used as a basis.

## Standardisation of front-of-pack labels

A variety of FOP labels have been launched by international organisations, non-profit organisations (NGOs), industry associations and individual companies, prompting governments to consider harmonising FOP labels.

An EU regulation adopted in 2011 harmonises nutrition labelling but allows EU Member States to promote voluntary additional forms of expression and presentation. Member States are now taking advantage of these provisions in order to set up nationwide, government-backed voluntary FOP labels. However, concerns over the impact of such additional forms of expression on the EU Single Market have been raised and one such scheme, the government-endorsed **UK** traffic light label, is under scrutiny by the European Commission. Following **France's** decision to back a different label, which ranks the nutritional value of products based on 100 g/ml using a palette of five colours ranging from green to red and the letters A to E, further concerns have been raised over the proliferation of nutrition labels and their effect on the Single Market. It has been further suggested that such schemes may need to be notified to the European Commission, giving the Commission and other Member States time and opportunity to express objections. In accordance with the 2011 Food Information to Consumers (FIC) Regulation, the Commission has to evaluate additional forms of expression by the end of 2017. Its assessment will likely be based chiefly on the UK and French schemes, although colour-coded labels are currently under consideration also in **Ireland, Portugal and Poland**.

The **Netherlands**, by contrast, has chosen to move away from using health symbols on pack and provide nutrition information via a smartphone app. The increasing significance of new technologies has not remained unnoticed on EU level either, with the Director General for Health and Food Safety of the European Commission—Xavier Prats Monné—taking note of alternative, off-pack options for labelling, arising with the advancement of new technologies. FOP labelling has also been a prominent issue in Asia for several years. In May 2011, **Thailand** became the first country to introduce mandatory FOP nutrition labels, which initially applied to five

snack categories, but were subsequently extended to all snack foods, chocolate, bakery products and other categories. Also in 2011, **South Korea** was the first Asian country to press ahead with recommendations for voluntary traffic light labels on children's food. On 25 May 2012, the Prime Minister's Office announced its intention to progressively introduce mandatory traffic light labelling to snacks and beverages, which would have made South Korea the first country globally to mandate traffic light labelling. Since then, two draft bills have been submitted to the Korean National Assembly, but their review has been delayed. Meanwhile, other Asian countries (**Singapore, Thailand and Malaysia**) have opted for the Healthier Choice Symbol, while the Philippines has introduced its own "Wise Eat" logo and Vietnam is working on a logo based on the Choices system. A warning statement is in place **Indonesia**, while **Sri Lanka** has introduced a red label for soft drinks with high sugar content. Colour-coded labels may also be introduced in **India**.

Given this proliferation of labels within the continent, an **ASEAN** regional initiative, supported by the ASEAN Food and Beverage Alliance (AFBA) and Food Industry Asia (FIA), aimed to introduce a level of consistency by implementing FOP GDA labelling guidelines, based on the guidelines used by FoodDrinkEurope. An industry toolkit, consistent with International Food and Beverage Alliance (IFBA) recommendations, was developed in the beginning of 2014. As a result, FIA members committed to roll out GDA labels for energy on FOP by the end of 2016 and AFBA and its member associations committed to promote the scheme among their members. In 2016, FIA released a study on GDA nutrition labelling, which revealed that out of the 13 FIA members surveyed across 19 Asian markets, 85% had rolled out GDAs (FIA, 2016).

Government-endorsed FOP nutrition labels are also being considered and/or implemented in several other countries (e.g. **Australia, New Zealand, Chile, Venezuela, Colombia, South Africa, Israel**). Key considerations are whether to make FOP labels mandatory and if so, whether they should emphasise a judgement of nutritional quality. In this respect, Australia and New Zealand, for example, have opted for a star rating system, combined with a nutrient icon component, and applied voluntarily. Other countries have chosen to use traffic lights or other colour-coded labelling. A draft regulation in **South Africa** sets requirements for a voluntary traffic light label for energy (in kJ), total sugar, fat, saturated fat and total sodium or salt equivalent per serving. Meanwhile other countries in the region, such as **Nigeria, Zimbabwe and Zambia**, have introduced various health logos.

**Israel** is also looking at colour-coded labels consisting of a negative (red) label for products with high quantities of sugar,

saturated fat and sodium and a positive (green) label for products conforming to the recommendations of the Ministry of Health.

The red label will apply in three stages, starting on 1 January 2018, 1 January 2019 and 1 January 2020, with progressively stricter criteria each year and will be accompanied by a warning statement.

“High in...” and other warning statements are particularly gaining popularity in South America, where they are already in place in **Chile, Peru** and **Venezuela** and under consideration in **Colombia**. By contrast, **Mexico** opted for GDAs and Ecuador for a colour-coded scheme, while **Argentina** is considering menu labelling.

While most countries globally have opted for voluntary FOP labelling, the labels in **Mexico, Ecuador, Chile** and **Peru** are mandatory, thereby further increasing the inconsistency between labelling requirements in the region.

In the **U.S.**, the Food and Drug Administration’s priority was to review the Nutrition Facts Panel (NFP) on BOP before making recommendations on FOP labels. The reform is now complete and changes include amending portion sizes, displaying calories more prominently, removing calories from fat, and including amounts of added sugars. With regard to FOP labelling, there have been no recent developments on national level, but warning statements for sugar-sweetened beverages have been proposed at the state level in California, Hawaii, New York, Washington and Vermont, and at the city level in Baltimore and Maryland (Kick the Can, 2017).

## The way forward

The debate over which nutrition labelling scheme is the most effective is likely to continue for the foreseeable future. More research would be useful to inform these discussions. Governments, NGOs, food manufacturers and retailers have all explored which scheme consumers might prefer, for what reasons and how certain schemes impact purchasing behaviour and balanced choices. While some evidence has emerged on several of these issues, there remains no consensus among stakeholders on the way forward. Evidence on the impact of the various schemes on purchasing behaviour, and therefore on their relative effectiveness in helping consumers make balanced choices, also remains limited, partly because of the relative novelty of interpretative guidance schemes in the marketplace.

In the **EU**, the question of how nutrition labelling affects trade within the Single Market is likely to remain on the agenda, but trade issues and in particular non-tariff barriers to trade have

arisen in other regions too and at the World Trade Organization (WTO). Standardisation of FOP labels can therefore be expected to remain on the agenda despite the increasing proliferation of labelling systems.

The increased use of new technologies is also gaining prominence with FOP labelling apps for smartphones being developed in various countries. Their take up by regulators has been slow until now but if their popularity grows, research on their effectiveness would also be useful.

Despite wide-spread disagreement about the effectiveness of the different FOP labels, there is broad agreement that the mandatory Nutrition Facts Panel/Table on the BOP is a useful public health tool that is intended to assist consumers in making informed and healthful food choices in the **EU, the U.S., Canada, Hong Kong, Malaysia, Australia, New Zealand and India.**

In addition, nutrition labelling is increasingly moving beyond packaged goods, particularly in **North & South America and Asia.** Menu labelling in restaurant chains with over 20 locations, selling substantially the same items and operating under the same name, is now mandatory in the **U.S.**, and will be enforced starting 5 May 2017. Meanwhile, the city of New York requires chain restaurants with 15 or more locations nationwide to display a warning icon and statement on menu items with high salt content (over 2300 mg of sodium).

While menu labelling research has proliferated in recent years, only a few studies look at the effect on purchasing behaviour in real-world situations and do so with conflicting results. There is some evidence of an effect on parents' decisions, but follow up research, factoring in children's choices and influence on their parents in real-life situations, is needed. More in-depth research into how menu labelling affects food choices would be useful in this debate, which is likely to continue, especially in countries with a higher proportion of out-of-home eating.

Overall, by providing nutrition information about the nutrient content of foods, nutrition labelling allows for—but does not necessarily cause—more healthful food choices. Recent studies have found that the presence of nutrition labels can improve subjective understanding of labelling, but did not note a significant difference in impact between the different types of labels.

Research has also found that use of nutrition labels is increasing across geographical regions, while differences based on gender, age, income and education levels persist. In order to understand these differences and strengthen the impact of labels on actual purchasing decisions, corollary issues related to consumer

motivation need to be considered: What factors underlie consumer motivation to make changes in their diets? How can appropriate and meaningful nutrition information be provided on the food label so that motivated consumers can act on their desire to improve their diets?

## Summary points

- **Policy decisions should fundamentally be based on science: the key question is which labelling scheme gives the best guidance from a nutritional point of view.** In this respect, it is clear that what matters is the overall diet, not the consumption of an individual product.

- **Nutrition labelling policy should take into account consumer use, interpretation and understanding of different nutrition labelling schemes, but ultimately it is the impact on purchasing decisions and overall diets that matters.** The consumer research section of this report showed that these factors vary from country to country and between consumer segments. Most research on FOP formats has been conducted in Europe, North America, Australia and New Zealand. Given the potential for variance, studies in other regions are needed to understand better local consumer attitudes. Research from South Africa (Koen et al., 2016) specifically highlights the need to conduct studies in developing countries as a priority. In addition, publicly available research on the actual impact of FOP nutrition labels is limited. In some countries, such as the U.S., research regarding consumers' preference and use of labels has been conducted by retailers on their own products, but is not publicly available as sales data are often proprietary.

**Further consumer research seems to be needed** in particular on the following questions:

- **Do consumers make long-term healthier food choices as a result of having used nutrition information on food packaging?** Some research has shown that consumers understand and know how to use accurately various nutrition labels should they choose to do so, but studies in Europe have shown no demonstrable short-term effect on purchasing decisions. Little is known about whether consumers make long-term healthier food choices as a result of having used nutrition information. If healthier food choices cannot be traced to nutrition information, other factors that motivate healthier food choices should be identified.

- **To what extent do nutrition labelling schemes have to be standardised to help consumers cultivate healthy eating habits?** Research by FLABEL, EUFIC and the Surrey Food Consumer Behaviour and Health Research Centre in Europe and by the



Australian Heart Foundation in Australia suggests that different labelling schemes can be equally effective in helping consumers identify healthy options, yet many groups discussed in this report assert that standardised nutrition labels are imperative. A future study on the impact of the EU regulation and the Australian star rating system would be insightful.

- How can consumers best be helped to make good use of nutrition labels to make better food choices? Research suggests that good use of nutrition labels is related to better nutrition knowledge, and that overall use is linked to health motivation. How can consumers be motivated to eat healthier? What awareness raising and education initiatives are most effective? Who should be the primary target of which information and education initiatives – parents, children, others?

- Is nutrition labelling beyond packaged foods useful? The menu labelling debate has moved beyond the U.S. to Canada, the UK, Ireland, Australia and Asia. Menu labelling research has proliferated in recent years, but is limited chiefly to Europe, North America and Australia. While studies have not delivered a clear message on the effect on food choice, some have attempted to explore the effect on the meals offered by restaurants. Further research on both issues is needed to fully gauge whether nutrition labelling beyond packaged foods has an impact on food choices.

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*The prevailing view is that standardised labels are preferable to a multitude of different nutrition labels, not only within each country but also within tightly integrated regions such as the EU. While there remains disagreement over what format is most effective on the FOP, different options, based on new technologies, are emerging and beginning to attract attention from policy-makers.*

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*While the U.S. and the majority of EU Member States have opted for labels based on reference intakes, some countries in Europe, South America and the Asia-Pacific region have chosen FOP schemes based on a judgment of nutritional quality.*

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