Oqali

2023 ACTIVITY REPORT

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Contents

1. PREAMBLE

The French Food Observatory (OQALI) was created in 2008 to support public policies aimed at improving the nutritional quality of food. Founded by the French Ministries of Food, Health and Consumer Affairs, it is jointly run by the National Research Institute for Agriculture, Food and Environment (INRAE) and the French Agency for Food, Environmental and Occupational Health & Safety (ANSES). It is part of the National Food and Nutrition Programme, which encompasses the activities of the National Programme for Food (PNA) and the National Health and Nutrition Programme (PNNS).

OQALI monitors the overall food supply and the nutritional quality of processed products available on the French market. To do this, it periodically carries out studies on different product categories such as breakfast cereals, fresh dairy products and desserts, and ready-to-eat frozen meals. Its missions also include undertaking studies on cross-cutting issues such as the use of certain ingredients (additives, sweetening ingredients, etc.), and monitoring the deployment of the Nutri-Score label and the implementation of collective agreements (as provided for in Article R. 230-38 of the French Rural and Maritime Fishing Code).

The aim of this report is to summarise OQALI's main activities in 2023.

2. HIGHLIGHTS

Several deliverables were published in 2023:

- **three follow-up studies** on ready-to-eat canned meals, ready-to-eat frozen meals and ready-to-eat fresh meals, resulting in the publication of 7031 new product sheets on its website;
- **one report concerning the first phase of the collective agreement** in the bakery sector on reducing the salt content of bread;
- **one annual follow-up report on Nutri-Score labelling**;
- **one document highlighting OQALI's main findings.**

In addition, in consultation with the supervisory ministries, a roadmap was drawn up in 2023. It aimed to reduce the time between the collection of data and the publication of the related studies by working on several levers, including the following:

- **Digitising the collection** of information from food packaging, in a single, structured format ensuring that the data collected are both reliable and representative;
- **Simplifying studies by food category** by reducing the number of monitored indicators;
- Developing **support tools for coding** the data collected.

Work was initiated in 2023 to make progress with regard to these issues.
Lastly, several other actions were launched in 2023, including the finalisation of cross-cutting studies on sweetening ingredients and ingredients conveying sweetness, and another one on the role of supply and demand in changes in nutritional intake by household category.

3. PUBLISHED DELIVERABLES AND KEY FINDINGS

3.1. Studies by food category

In 2023, follow-up studies comparing three collection periods were published for the categories of ready-to-eat canned meals, ready-to-eat frozen meals and ready-to-eat fresh meals. The main results of these studies are summarised below.

3.1.1. Follow-up study on ready-to-eat canned meals in 2010, 2016 and 2020

The study described changes in supply, labelling information and nutritional composition for ready-to-eat canned meals between 2010 (T0, covering 43% of the market), 2016 (T1, 48%) and 2020 (T2, 67%). The key findings were as follows:

- Supply by sub-category remained stable overall in percentage terms between 2016 and 2020. Nevertheless, significant turnover in supply was noted, reflecting the momentum of product launches/withdrawals (69% of products in 2020 were added products (n=1852));

- Labelled nutritional information changed significantly between 2016 and 2020, across the entire category: it increased for nutritional claims (+13 percentage points) and decreased for nutritional guidelines (-14 percentage points), serving sizes (-19 percentage points) and nutritional values per serving[1] (-19 percentage points). The frequency of health claims remained stable overall for this period;

- The significant changes in average nutritional values observed in this category concerned a limited number of sub-categories between 2016 and 2020:
  - For fat: an upward trend was observed (one sub-category out of 39: other canned meals);
  - For sugar, protein and salt: downward (three sub-categories out of 39 for sugar: cooked vegetables, canned "quenelle" dumplings and sausages with lentils; one sub-category out of 39 for protein: paella; one sub-category out of 39 for salt: canned sausages with lentils) and upward (one sub-category out of 39 for sugar: other canned meals; one sub-category out of 39 for protein: canned fish and vegetables; and one sub-category out of 39 for salt: other canned meals) trends were observed.

  These were often related to the turnover in supply but sometimes also reflected potential reformulation efforts made by manufacturers for certain sub-categories;

- With weighting by market share, the number of significant changes (both upward and downward trends) in average nutritional values increased;

- The ready-to-eat canned meals category was one of the first for which Nutri-Score labelling was studied[2];

[1] Optional information differing from the nutritional values per 100 g required under Regulation (EU) 1169/2011 on the provision of food information to consumers, known as the "INCO" Regulation.
[2] These results provide no indication of the impact of Nutri-Score labelling in other categories.

- In 2020, few products in this category showed the Nutri-Score label (16% of products) and the vast majority that did had a score of A or B (90% of the products bearing the logo);
- For most sub-category/nutrient pairs, products with the Nutri-Score label had nutritional content comparable to those without it[3];
- More generally, across the entire category, Nutri-Score labelling was not associated with a significant change in market share or nutritional values, considering products available in both 2016 and 2020. It should be noted that the limited impact of Nutri-Score labelling was likely due to the low level of incentive for reformulation, as ready-to-eat canned meals had already been relatively well positioned in nutritional terms in 2016.

3.1.2. Follow-up study on ready-to-eat frozen meals in 2012, 2016 and 2020

The study described changes in supply, labelling information and nutritional composition for ready-to-eat frozen meals between 2012 (T0, covering 59% of the market), 2016 (T1, 64%) and 2020 (T2, 76%). The key findings were as follows:

- Supply by sub-category remained stable overall in percentage terms between 2016 and 2020. Nevertheless, significant turnover in supply was observed, reflecting the momentum of product launches/withdrawals (51% of products in 2020 were added products (n=1069));

- Concerning labelled information across the entire category, the presence of nutritional claims increased significantly between 2016 and 2020 (+4 points), whereas that of nutritional guidelines and serving sizes significantly decreased (-5 points and -6 points respectively). The labelling of health claims and nutritional values per serving[4] remained stable overall;

- In terms of trends in nutritional composition with no weighting by market share, very few significant changes were observed between 2016 and 2020 for the six nutrients studied. Average levels significantly changed as follows:
  - they decreased for four nutrients: fat (one sub-category out of 32: pasta Bolognese), saturated fatty acids (one sub-category out of 32: breaded cheeses), protein (one sub-category out of 32: other ready-to-eat frozen meals), and salt (three sub-categories out of 32: paella, sushi, vegetable patties/gratins/flans);
  - they increased for sugar (one sub-category out of 32: fish burger/fillet);
  - for dietary fibre: average levels decreased for two sub-categories (moussaka, pasta Bolognese) and increased for one sub-category (starchy foods), out of the 24 sub-categories studied.

It should be noted that despite the small number of significant changes highlighted, some sub-categories showed significant variability in levels of one or more nutrients, implying that there is room for reformulation (for meat without sauce and starchy foods in particular).

[3] Few sub-categories were tested due to the small number of products showing the Nutri-Score label.
[4] Optional information differing from the nutritional values per 100 g required under Regulation (EU) 1169/2011 on the provision of food information to consumers, known as the “INCO” Regulation.

- With weighting by market share, the number of significant changes (both upward and downward trends) in average nutritional values increased;

- The ready-to-eat frozen meals category was one of the first for which Nutri-Score labelling was studied[5];
  - Products showing the Nutri-Score label accounted for 19% of all products in 2020, and the vast majority had a score of A or B (78% of products with the Nutri-Score label);
  - For most sub-category/nutrient pairs, products with the Nutri-Score label had nutritional content comparable to those without it[6]. However, when market share was included in the analysis, significant differences were observed for a large number of sub-categories, due to the logo being present on some products with high market share;
  - Across the entire category, Nutri-Score labelling was not associated with a significant change in market share or nutritional values, considering products available in both 2016 and 2020;
  - The limited impact of Nutri-Score labelling was likely due to the low level of incentive for reformulation in this category, as ready-to-eat frozen meals had already been relatively well positioned in nutritional terms in 2016.

3.1.3. Follow-up study on ready-to-eat fresh meals in 2009, 2016 and 2020

The study described changes in supply, labelling information and nutritional composition for ready-to-eat fresh meals between 2009 (T0, covering 34% of the market), 2016 (T1, 52%) and 2020 (T2, 71%). The key findings were as follows:

- Supply by sub-category remained stable overall in percentage terms between 2016 and 2020. Nevertheless, significant turnover in supply was noted, reflecting the momentum of product launches/withdrawals (67% of products in 2020 were added products (n=1518));

- Labelled nutritional information changed significantly between 2016 and 2020, across the entire category: it increased for nutritional claims (+9 percentage points) and decreased for nutritional guidelines (-27 percentage points), serving sizes (-17 percentage points) and nutritional values per serving[7] (-28 percentage points). The frequency of health claims remained stable overall for this period;

- The significant changes in average nutritional values observed in this category concerned a relatively limited number of sub-categories between 2016 and 2020:
  - A downward trend was observed for two nutrients: dietary fibre (three sub-categories out of 37: sauerkraut, fried nems, and meat free alternatives to fresh meat products) and salt (three sub-categories out of 37: cordons bleus and similar, pasta Bolognese, and cooked meats);

[5] These results provide no indication of the impact of Nutri-Score labelling in other categories.
[6] Very few sub-categories could be tested due to the small number of products bearing the logo, and few significant effects were observed.
[7] Optional information differing from the nutritional values per 100 g required under Regulation (EU) 1169/2011 on the provision of food information to consumers, known as the "INCO" Regulation.

- For saturated fatty acids and sugar: downward (four sub-categories out of 37 for saturated fatty acids: cooked vegetables and starches, cottage pie, fish and/or seafood with vegetables or starchy foods, and cooked meats; five sub-categories out of 37 for sugar: blanquettes, cordons bleus and similar, "quenelle" dumplings, cooked meats, and breaded meats) and upward (one sub-category out of 37 for saturated fatty acids: potato gratins; one sub-category out of 37 for sugar: stuffed pasta and gnocchi) trends were observed.

These were often related to the turnover in supply but sometimes also reflected potential reformulation efforts made for certain sub-categories.

➢ With weighting by market share, the number of significant changes (both upward and downward trends) in average nutritional values increased;

➢ The category of ready-to-eat fresh meals was one of the first for which Nutri-Score labelling was studied[8];
  - In 2020, one third of products in this category showed the Nutri-Score label (33% of products) and the majority of these had a score of A or B (73% of products bearing the logo);
  - For most sub-category/nutrient pairs, products with the Nutri-Score label had nutritional content comparable to those without it[9];
  - More generally, across the entire category, Nutri-Score labelling was not associated with a significant change in market share for products available in both 2016 and 2020. However, the presence of the logo was associated with a significant decrease in the average sugar contents, considering products available in both 2016 and 2020. It should be noted that the limited impact of Nutri-Score labelling was likely due to the low level of incentive for reformulation, as ready-to-eat fresh meals had already been relatively well positioned in nutritional terms in 2016.

3.2. Monitoring the deployment of the Nutri-Score label

To monitor the deployment of the Nutri-Score label, OQALI continues to collect information provided by the manufacturers and distributors that signed on to this system. However, this information was not processed in 2023, due to difficulties in the collection and updating of the data submitted.

Nevertheless, OQALI worked with *Santé publique France* to consolidate the list of the brands committed to Nutri-Score in 2023. It then used this information to draw up its annual report on the deployment of the Nutri-Score label, in terms of the market share of the brands concerned. The key findings of this report[10] were the following:

➢ In June 2023, **1197 companies had pledged to use the Nutri-Score labelling system** in France;

[8] These results provide no indication of the impact of Nutri-Score system in other categories.
[9] Few sub-categories were tested due to the small number of products showing the Nutri-Score label
[10] In this study, the market share of the brands implementing the Nutri-Score system between 2020 and 2023 was estimated based on Kantar Worldpanel data from 2020.

- Since 2018, the estimated market share of the brands concerned has steadily increased, reaching **62% of sales volumes in 2023, broken down as follows: 30% for retailer brands, 22% for national brands** and 9% for other types of brands[11]. However, this increase in sales volumes has been more modest since 2021 because:
  - **Ninety-eight percent of retailer brands (entry-level or otherwise) had already signed on to the system by 2021;**
  - **the growth of national brands has been moderate since 2021. Indeed, the market share of the national brands involved rose from 34% to 36% between 2021 and 2022, reaching 41% in 2023**. Although this increase in market share between 2022 and 2023 remained modest in relation to the 19 new operators that signed on during this time, it was the sharpest observed over this period, as the **market share of the committed brands remained stable overall for other types of brands.**

3.3. Monitoring collective agreements

In March 2022, professionals in the bakery sector signed a collective agreement[12] with the public authorities aimed at reducing the salt content of bread. OQALI was appointed as a third party to monitor achievement of the agreement's targets.

The collective agreement sets out the commitments of professionals in the bakery sector, i.e. the French Trade and Retail Federation (FCD), E. Leclerc, Intermarché, the French Federation of Bakery/Pastry Companies (FEB), the French National Confederation of French Bakery and Pastry (CNBPF), the French Biscuits, Cakes and Bread Products Association, the French Association for Specialised Nutrition/Adult Dietetics sector, the National Association of Bakery Ingredient Manufacturers (Syfab), and the National Association of French Milling (ANMF).

The salt reduction targets are staggered between 2022 and 2025 and are progressive for sandwich bread and standard breads (Figure 1). They correspond to maximum thresholds not to be exceeded for 100 g of bread as consumed.

[11] Other types of brands correspond to entry-level retailer brands, hard discount, and specialised organic and non-organic retailer brands.
[12] The text of the collective agreement is available on the website of the French Federation of Bakery Companies: https://www.entreprisesboulangerie.org/wp-content/uploads/20220303_Accord_sel_pain_signe.pdf.

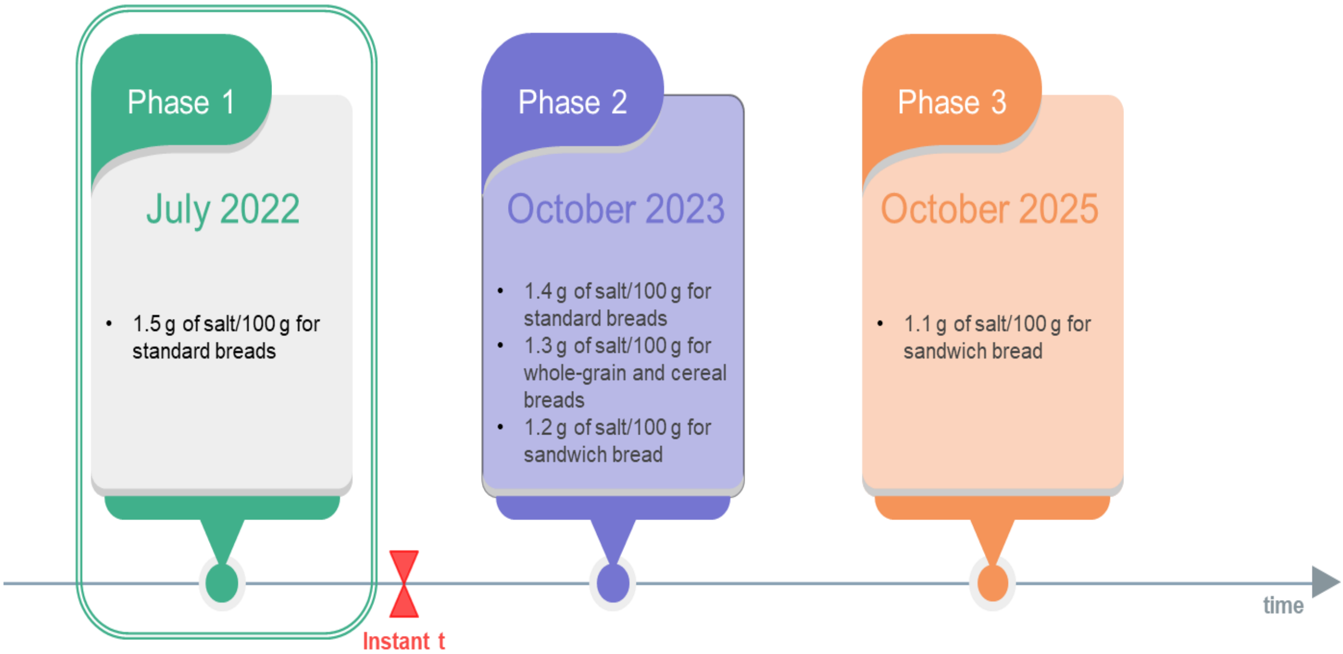

Figure 1: The three phases of the collective agreement of professionals in the bakery sector with maximum levels of salt per 100 g of bread for each type of bread

In May 2023, OQALI published a report on the first phase of the collective agreement focusing on standard breads collected between June 2022 and January 2023. It showed that, considering the salt levels analysed, regardless of the region and distribution channel, 82.5% of breads complied with the threshold set out in the agreement. When measurement uncertainty was factored in, all the breads complied with the agreement. Since 2015, the average salt content in (standard) bread has therefore decreased by 20%, bearing in mind that breads and refined dried bread products are the leading contributors to salt intake in the French population. To date, no other collective agreements have been signed for other sectors.

4. OQALI'S OTHER ACTIVITIES IN 2023

Over the course of 2023, OQALI collected data on fresh dairy products and desserts (but was unable to finalise its data collection due to a lack of participation by professionals), hot sauces, and confectionery.
Work on sectoral studies on cheeses and soft drinks moved forward, as did cross-cutting studies on the use of sweetening ingredients and ingredients conveying sweetness and the role of supply and demand in changes in nutritional intakes by household category. However, the results of these studies had not yet been published by the end of 2023.

4.1. Optimising operation

4.1.1. Reflection on the digitisation of data collection

To improve the efficiency of its data collection, OQALI has been actively monitoring progress in the digitisation of information since 2009. The observatory therefore remains watchful of all initiatives taken in this area (NumAlim, ConsoTrust, ScanUp, Open Food Facts, etc.).
To this end, discussions with ScanUp have continued to assess the reliability and representativeness of its data, compared with those collected traditionally by OQALI, for the 2022 processed potato products category. This work is in progress and will be finalised in 2024.
OQALI has also continued its discussions with NumAlim and its partner, ConsoTrust. Following the cessation of NumAlim's activities, OQALI took steps to develop a test identical to the one initiated for ScanUp; this test will be implemented in 2024.

4.1.2. Improving OQALI's visibility

To improve the visibility of its data and make them easier to use, OQALI has added a data visualisation module to its public data consultation tool, making descriptive statistics and graphs on nutritional content available on request. This tool is available, in French only, via the following link: https://www.oqali.fr/donnees-publiques/base-de-donnees-oqali/stats.

In April 2023, OQALI also published a communication document promoting its work; this document remains available on the observatory's website for consultation by the general public.

4.1.3. Development of data coding support tools

OQALI continued to carry out work on a semi-automatic support tool for coding data collected in its categories and sub-categories. This tool will be tested in particular with digitised data to determine whether it is suitable for coding data from such sources.

4.1.4. Methods

In 2023, OQALI worked to update the report setting out all the methodologies used in its sectoral studies; it aims to publish this report in 2024.

4.2. International expansion of OQALI

In 2023, the OQALI-ANSES team continued to contribute to work aimed at rolling out the OQALI model in some 20 European countries as part of the EU Best-ReMaP Joint Action. It also took part in the final Best-ReMaP conference, which was held in September 2023 at the French Ministry of Health.

Furthermore, ANSES was involved in setting up a project to continue these European activities as part of the EU Joint Action on health determinants (Prevent NCD) coordinated by Norway, in order to analyse and interpret the data collected to date.

5. DIALOGUE WITH STAKEHOLDERS

5.1. Governance

In 2023, regular updates were provided to stakeholders at various meetings of the:

- Strategic Steering Committee (DGS[13], DGAL[14], DGCCRF[15], ANSES, INRAE) on 26 January;
- Steering Committee (DGS, DGAL, DGCCRF, ANSES, INRAE) on 31 January, 18 April, 29 June and 3 October;
- Technical Orientation Committee (DGS, DGAL, DGCCRF, ANSES, INRAE, ANIA[16], FCD[17], *Familles Rurales*[18], CLCV[18]) on 16 May and 14 November.

5.2. Sectoral working groups

The sectoral working groups are made up of OQALI members (ANSES and INRAE) and industry representatives in the sector that have taken part in data collection. The aims are to present the results of sectoral studies in advance of publication and discuss possible explanations for the trends observed.

Over the course of 2023, feedback on sectoral studies was organised for the following categories:

- Cheeses: on 12 September 2023;
- Ready-to-eat fresh meals: on 21 September 2023;
- Soft drinks: on 22 September 2023.

5.3. Stakeholder consultation on the simplification of deliverables

The simplification of sectoral studies was identified in the roadmap as a way to improve OQALI's efficiency. Several lines of work have been explored:

- transferring certain indicators into the data visualisation tool developed in 2023;
- reorganising the main text of reports to make it more intelligible;
- refocusing indicators on changes in supply and nutritional values, eliminating certain indicators related to labelling parameters.

At the end of 2023, OQALI's stakeholders (members of the OQALI Steering Committee and Technical Orientation Committee, partner distributors not affiliated with the FCD, partner associations and manufacturers not affiliated with ANIA) were consulted regarding the indicators that OQALI intends to eliminate from its studies. A total of 59 stakeholders answered the survey,

[13] Ministry in charge of Health
[14] Ministry in charge of Agriculture
[15] Ministry in charge of Economy
[16] National Food Industry Federation
[17] French Trade and Retail Federation
[18] Consumers' associations

including ministries, trade unions, distributors, manufacturers, and consumer associations. Following an analysis of the results and a discussion with the members of the OQALI Steering Committee, feedback will be given in 2024.

6. OUTLOOK FOR 2024

In addition to the continued implementation of sectoral and cross-cutting studies, the priority for the 2024 work programme will be to continue to explore digitised data with the completion of the tests initiated with the ScanUp and ConsoTrust databases. Work aimed at simplifying sectoral studies will also be continued.

With regard to collective agreements, a second report will be written on the monitoring of targets for reducing salt content in bread.

Work involving the international expansion of OQALI will also continue in 2024.