



**Euromonitor
International**

Nutritional Choices: Consumers and Governments

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Scope

Key findings

EVOLUTION OF CONSUMER CHOICES

Consumers prioritise nutrition over the reduction of less healthy ingredients

Health is the main consumer driver of nutrition choices

Developed countries drive calorie purchases in packaged food

Regional differences in the contribution of each category to total energy purchasing

The contribution of fat and carbs to calorie intake depends greatly on eating trends

Sugar driven by well-established snacking habits in developed regions

Salt intake is above the recommended levels in key markets

Middle East and Africa shows the strongest growth in total purchasing of protein

Despite low global per capita purchasing, fibre stands out, primarily in developed countries

Positive nutrition prevails in product health positioning around the globe

No sugar is the leading sugar-related claim, driven by confectionery

High protein claim is widely used by the food giants

Surge in the high fibre claim is driven by the increasing focus on gut health

Prevalence of low-fat claims is hampered by their association with "processed"

ASPIRATIONS FOR PUBLIC HEALTH

Obesity is the main concern for authorities to address to improve public health

Regulations and guidelines in the food industry: Differences and similarities

Front-of-pack labels (FOP): An overview of purposes of different labels

FOP nutrition labels are better established in Western Europe

UK's battle against high fat/salt/sugar food reflects increasing obesity...

...and gets an immediate response from the food industry

Fighting against trans fat is on the agenda of the EU

Obesity is also a growing concern in Latin America

US: High salt intake is on the agenda of the FDA

Canada: New regulation mandates the use of an FOP nutrition label in packaged food

OUTLOOK

Making nutritious food affordable is key to improving public health

More impactful warning labels could be used to get consumers' attention

Focusing on permissible indulgence is one way to benefit from FOP nutrition labelling

FOP labelling schemes offer opportunities for substitutes to overcome health halo challenge

Key takeaways for authorities

Key takeaways for businesses

Nutrition methodology

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