

FROM SEED TO SPOON

The contribution of
breakfast cereals
to achieving
balanced diets
and sustainable
food systems





WHO WE ARE

CEEREAL represents **the European breakfast cereal and oat milling industry** and brings together international brands as well as family-owned businesses of all sizes. CEEREAL currently has nine company members and nine national association members from eight countries. More information is available on www.ceereal.eu.

CEEREAL members **provide millions of people in Europe with safe, nutritious, grain-based breakfasts**. Breakfast cereal consumption is associated with diets higher in vitamins, minerals, and fibre as well as whole grain, and lower in fat¹. Breakfast cereals can also be a source of protein and are often eaten together with other nutritious foods, such as fresh fruit and milk, including non-dairy alternatives².

Moving to a more plant-rich, high-fibre diet, including vegetables, fruits, nuts, seeds and whole grains, **offers combined health and environmental benefits**³.

¹ Williams, P. "The benefits of breakfast cereal consumption: a systematic review of the evidence base." *Advances in Nutrition*, vol. 5, no. 5, 2014, pp. 636S-673S, doi: <https://doi.org/10.3945/an.114.006247>.

² Priebe, M., et al. "Effects of ready-to-eat-cereals on key nutritional and health outcomes: A systematic review." *PLOS ONE*, vol. 11, no. 10, doi: <https://doi.org/10.1371/journal.pone.0164931>.

³ Willet, W., et al. "Food in the Anthropocene: the EAT-Lancet Commission on healthy diets from sustainable food systems." *The Lancet*, vol. 393, no. 10170, 2019, pp. 447-492, doi: [https://doi.org/10.1016/S0140-6736\(18\)31788-4](https://doi.org/10.1016/S0140-6736(18)31788-4).



PLANTING THE SEEDS FOR A MORE SUSTAINABLE FOOD SYSTEM

We want to make sure that people in Europe have better access to a broader range of breakfast cereal options that are safe, nutritious, accessible, sustainable, convenient, and enjoyable. To achieve this, we continue to support the transition towards a sustainable food system – from seed to spoon.

We take our role in people's diets seriously: between 2015 and 2020, CEEREAL members have reduced sugar by 10.2%, increased the fibre content by 8.9% and whole grain by 17.2% (see page 6). We have made significant progress and will continue our efforts to raise the bar.

OUR COMMITMENTS



We further improve the nutritional value of breakfast cereals



We help people choose a safe, nutritious and balanced breakfast



We continue to advertise responsibly and promote the benefits of breakfast



We step up efforts to reduce the environmental footprint of breakfast cereal production and consumption

Our commitments are intrinsically linked to the ambitions of the EU Farm to Fork Strategy, which aims to build a fair, healthy and environmentally friendly food system. Achieving these objectives requires a pact of responsibility: a collaborative effort from both the private and public sector as well as an enabling policy framework.

The European breakfast cereal and oat milling industry is dedicated to building a constructive collaboration with policymakers and stakeholders, both at European and national levels, to achieve our common goals.



WHAT BREAKFAST CEREALS ARE AND HOW THEY ARE PRODUCED

Breakfast cereals refer to oats, muesli, granola and cereals. As grain-based foods, they are mainly made of oats, wheat, maize, rice, and barley. To make them consumable, more nutritious, safe, and to turn them into the products people find on the shelves, breakfast cereals go through several stages of preparation.

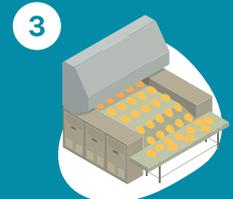
HOW BREAKFAST CEREALS ARE PRODUCED



1 Harvested & milled



2 Mixed



3 Cooked & Shaped

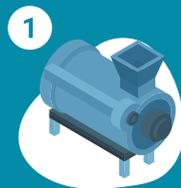


4 Baked & Coated



5 Packaged

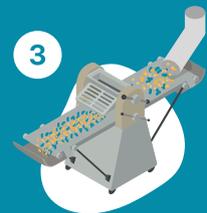
HOW OATS ARE PREPARED



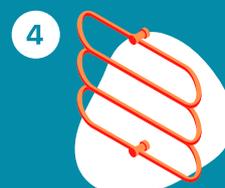
1 De-hulled & kilned



2 Steamed



3 Rolled



4 Dried



5 Packaged



WE FURTHER IMPROVE THE NUTRITIONAL VALUE OF BREAKFAST CEREALS

OUR COMMITMENTS

We will help people eat more fibre and whole grains by increasing the variety of our offer, and by making it easier for people to identify these products and understand their benefits.

We will continue our effort to reduce sugar, maintain low levels of salt, and work on reformulation, innovation, and fortification to offer healthier and tasty options to people.

POLICY ENABLERS

We ask policymakers to review provisions on nutrition and health claims to make it possible for companies to communicate the public health benefits of products containing fibre and whole grains.

We ask policymakers to review and extend permitted uses of sweeteners and to harmonise the legal framework for fortification. The sugar reduction claims framework should be reviewed to make it possible to communicate small but nonetheless significant changes.



PROGRESS IN DIFFERENT COUNTRIES

In 2018, the **French** breakfast cereal manufacturers committed to further reduce sugar in children and adolescents' products by 7% on average by 2020. Between 2011 and 2017, the fibre content increased by 21% and whole grain content by 20%, the sugar content decreased by 15% and the salt content by 23%.

In 2018, the **German** breakfast cereal manufacturers agreed to continue improving the nutritional composition of their products, including sugar, whole grain and fibre. The aim was to reduce the total sugar content of products marketed to children, weighted by their sales, by an average of at least 20% by 2025 as compared to 2012. Recent monitoring demonstrates that the reduction target has already been met and also significant salt reductions have been achieved in almost all categories.

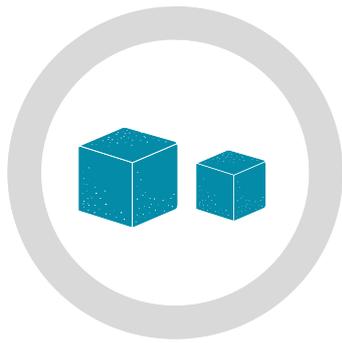
In 2015, the **Italian** breakfast cereal producers agreed to further reduce the average levels of sugar, trans-fatty acids and sodium, and to increase fibre in all products on the market targeted to children and 'all family' products eaten by children. A monitoring conducted in February 2018 in accordance with the Ministry for Health, demonstrated that all the targets had been met.

In 2019, the **Portuguese** breakfast cereal sector agreed a 10% sugar reduction (weighted average based on sales) across the category by the end of 2022. Producers also agreed the target of no more than a weighted average of 1g/100g salt.

In 2018, the **Spanish** breakfast cereal association, as part of a broader commitment of FIAB (the Spanish Food and Drink Federation), agreed a 10% reduction of the median content of total sugars in children's chocolate breakfast cereals. The commitment ended in December 2020. During 2021, AESAN (the Spanish food safety agency) will carry out a final evaluation to check if the agreements have been reached. The results are expected in Q3 or Q4 of 2021.

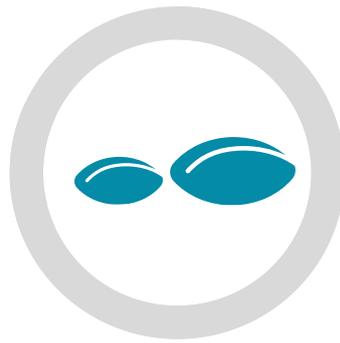
In the **UK**, breakfast cereal manufacturers have successfully reduced salt levels in breakfast cereals by 64% since 1998 and cut added sugar from recipes by nearly 20% since 2010. A sugar reduction programme was initiated by the UK Government in 2017 with the target of a 5% sugar reduction (sales weighted average) required for year one, and an additional 20% reduction in added sugars by 2020. In May 2018, the breakfast cereals category met the initial 5% sugar reduction ambition for year one.

ACHIEVEMENT IN REFORMULATION AMONG BREAKFAST CEREAL PRODUCERS FROM 2015 TO 2020



-10.2%

sugar



+17.2%

whole grain



+8.9%

fibre

BREAKFAST CEREAL PRODUCERS DECREASE SUGAR BY 10.2% IN 2020 VS. 2015

In 2015, the EU High Level Group on Nutrition and Physical Activity set the target of at least 10% reduction in added sugars by 2020 in three product categories, including breakfast cereals¹.

In 2021, CEEREAL members can confirm that this target has been met. Sugar has been reduced by 10.2% from 2015 to 2020².

This has not been the only achievement in reformulation within the breakfast cereal industry over the past five years: the fibre content in breakfast cereal recipes increased by 8.9%, and whole grain increased by 17.2%.

Overall, people in Europe today eat breakfast cereals with less sugar, more fibre and more whole grain content on average than five years ago.

HOW BREAKFAST CEREALS CONTRIBUTE TO PUBLIC HEALTH

Breakfast cereals contribute to public health by helping to establish good base levels of key micronutrient intakes in the population³, which in particular helps to protect vulnerable groups. This can be done through the inclusion of whole grains, which are a natural source of vitamins, minerals and fibre. Micronutrient fortification, as a recognised public health strategy in various countries, can also help people meet their nutritional needs.

¹ Robinson, M. et al. "Sugars content in selected foods in the EU: a 2015 baseline to monitor sugars reduction progress." Publications Office of the European Union, JRC108670, 2018, doi: <http://dx.doi.org/10.2760/047295%20>.

² On a sales weighted basis for recipes constituting 85% of volume sales in the EU and UK for CEEREAL members in 2015 and 2020.

³ Hennessy, Á., et al. "The impact of voluntary food fortification on micronutrient intakes and status in European countries: A review." Proceedings of the Nutrition Society, vol. 72, no. 4, pp. 433-440, doi: <https://doi.org/10.1017/S002966511300339X>



 #2

WE HELP PEOPLE CHOOSE A SAFE, NUTRITIOUS AND BALANCED BREAKFAST

OUR COMMITMENTS

We will contribute to the EU's development of mandatory harmonised front-of-pack nutrition labelling to ensure it is recognisable and understandable across Europe.

POLICY ENABLERS

We ask policymakers to provide legal clarity and remove barriers within the EU Single Market linked to the proliferation of different national front-of-pack nutrition labels and divergent interpretations of existing legislation.

NUTRITION LABELLING

Our members strive to provide people across Europe with consistent information that will help them choose a nutritious and balanced breakfast option. The breakfast cereal industry has been at the forefront of applying national nutritional labelling schemes – either voluntarily or in compliance with the law.

WHY CEEREAL SUPPORTS HARMONISING FRONT-OF-PACK NUTRITION LABELLING

Harmonised labelling will make it easier for people to identify breakfast cereal options that are consistent with their dietary guidance. In the EU alone, there are currently six different front-of-pack nutrition labelling schemes developed or endorsed by the public sector¹, which can lead to confusion and inconsistent information. A harmonised scheme will also help reduce supply chain complexity and legal uncertainty for companies that provide products in various markets, and strengthen the Single Market.

We will continue providing good value per bowl by offering breakfast cereal options that are safe, nutritious, accessible, sustainable, convenient and enjoyable.



€0.30

the average cost of
a bowl of breakfast cereal
with milk per serving²

¹ Report from the Commission to the European Parliament and the Council regarding the use of additional forms of expression and presentation of the nutrition declaration, COM (2020) 207 Final.

² Based on Euromonitor data 2020 for 125ml milk, for EU and UK, and based on IRI/Nielsen industry average calculations of price per kilo taking into account 30g servings for cereals and porridge and 45g servings of granola and muesli for the top 12 countries in Europe's moving annual trend from April 2020 to March 2021.



#3

WE CONTINUE TO ADVERTISE RESPONSIBLY AND PROMOTE THE BENEFITS OF BREAKFAST

OUR COMMITMENTS

We will not engage in marketing communications to children in primary schools, early childhood education centres or children's care service centres across the EU27, except where specifically requested by, or agreed with, the school administration for educational purposes.

We will step up efforts to promote the benefits of breakfast.

POLICY ENABLERS

We ask policymakers to recognise the significant contribution of self-regulation, voluntary codes of conduct and public-private partnerships to the success of national health strategies. Engaging all relevant stakeholders in these initiatives should remain a prerequisite to better regulation.

National dietary recommendations and campaigns should emphasise the importance of consuming fibre and whole grain. Public-private partnerships could help promote the benefits of breakfast consumption as well as increased consumption of fibre and whole grain.



The EU Pledge is a voluntary initiative by 23 companies, including various CEEREAL members **to change the way they advertise to children under 12**. Between 2009-2014, there was a significant drop in children’s exposure to food and soft drink ads on all media from TV to social media. In 2015, harmonised nutrition criteria were adopted for those companies that advertise to under 12s. The common criteria set energy caps, maximum thresholds for nutrients to limit salt, saturated fat and sugar and minimum requirements for positive nutrients. Compliance rates – at 98.9% in 2019 - are continuously monitored and a compliance mechanism was put in place in 2018.



Under the commitments of the International Food & Beverage Alliance (IFBA), 12 globally active companies, including several CEEREAL members, have committed **to not engage in marketing communications to children in primary schools**, early childhood education centres or children’s care service centres, except where specifically requested by, or agreed with, the school administration for educational purposes.



The ICC Advertising and Marketing Communications Code of the International Chamber of Commerce has been the guiding compass for those involved in advertising since 1937. Its self-regulatory system aims **to build trust through responsible marketing**. A special section refers to marketing communication directed to or featuring children under 12. The ICC Framework for responsible food and beverage marketing communications underlines the importance to take into consideration the perception of children when using nutritional information and claims.



CEEREAL and some of its member companies are part of the Whole Grain Initiative (WGI), which is coordinated by the International Association for Cereal Science and Technology. WGI aims **to increase consumption of whole grains** and brings together public health experts, manufacturers, marketers, grain scientists and government regulators from 36 countries.



CEEREAL, together with a network of partners, including the European Federation of the Associations of Dietitians and the European Medical Association launched the “Breakfast is Best” campaign in 2018. It **raises awareness of the importance of eating breakfast** and issued a report reviewing national policies and health campaigns in Europe.



WE STEP UP EFFORTS TO REDUCE THE ENVIRONMENTAL FOOTPRINT OF BREAKFAST CEREAL PRODUCTION AND CONSUMPTION



OUR COMMITMENTS

We will contribute towards reducing the environmental impact of breakfast cereal products, including by working together with farmers to promote the uptake of regenerative agriculture principles and practices and optimising production processes within our operations.

We will step up progress towards circular and sustainable packaging and the reduction of food waste along the supply chain.

POLICY ENABLERS

We ask policymakers to support farmers in the uptake of regenerative agriculture to make breakfast cereals more sustainable while remaining accessible.

We ask policymakers to encourage overall food waste reduction and to improve the understanding of date marking. Packaging waste, sustainability and labelling measures should be harmonised to ensure the free flow of goods.



The following is a selection of sustainability practices among the CEEREAL membership. You can find more detailed information and additional case studies on www.from-seed-to-spoon.info. We will continuously update this website and add new examples.

REDUCING GREENHOUSE GAS EMISSIONS

Companies are continuing to reduce their emissions, transitioning to renewable sources of energy, and improving the efficiency of their production processes. For example, all Cereal Partners Worldwide (CPW) manufacturing sites in the EU and the UK purchase 100% renewable electricity. Kellogg sources 100% renewable grid electricity in Europe and has reduced its Scope 1 and 2 greenhouse gas emissions by 28% globally since 2015. Brüggén KG has reduced its gas consumption in Lübeck by 14% and its electricity consumption by 8% in 2020 compared to 2018 based on the produced volumes. The carbon dioxide emissions impact was reduced by 8% compared to the previous year.

RESPONSIBLE SOURCING

Responsible sourcing is about increasing local cultivation, or supporting local farmers in implementing sustainable agricultural practices, and participating in alliances to reduce the impact of cultivation globally. Good examples are the Roundtable on Sustainable Palm Oil, the Rainforest Alliance, Fair Trade and organic certification (Brüggén), awareness-raising campaigns around oats (oat millers in Germany), CPW's "Préférence" Programme in support of French farmers, and Kellogg's Origins programme helping Spanish farmers to step up sustainability practices.



PACKAGING REDUCTION AND RECYCLABILITY

Packaging reduction and recyclability is about stepping up recyclability of packaging, increasing recycling availability for people, and using less resources to produce packaging. For example, 98.5% of CPW's cereal packaging in Europe is recyclable or recyclable by design, with plans in place to achieve 100% in 2025. Both Kellogg and CPW have launched new types of cereal boxes with reduced packaging. Kellogg now uses 190t less cardboard and plastic annually. CPW in the UK has reduced packaging material by 15% and road miles by 115,000, corresponding to 178t less carbon dioxide per year.

GLOBAL INITIATIVES

Several CEEREAL members are engaged in global initiatives, such as:

The **Champions 12.3** initiative aims to halve food loss and waste by 2030, as per the Sustainable Development Goal 12.3. Companies in partnership with food suppliers act together to tackle the issue from farm to fork.

The **Sustainable Agriculture Initiative (SAI)** platform brings together 120 companies and organisations to ensure that the agricultural commodities and ingredients they use are supplied from sustainable sources.



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