

Clean Label- What does this mean for the bakery industry?

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What will be covered?

- What does clean label mean?
 - Do we define it the same way that consumers do?
- Is there a legal definition of clean label?
- What clean label means for a baker
 - Additive replacement
 - Sugar reduction
 - Salt replacement

Clean label

- Demand for “clean label” has seen tremendous growth, and brought the need for new ingredients, manufacturing processes and communication strategies
- A very ambiguous term
- Seen as an industry standard, but no clear definition

Is the baking industry
prioritising the correct areas
when developing clean label
products?

Campden BRI aims to understand both the industry position, and how consumers understand the term

Does clean label mean anything to consumers?

Do consumers care about clean label? What do they expect?

Does the industry have a definition?

Do consumers and industry have the same understanding?
Do industry efforts match consumers' expectations?

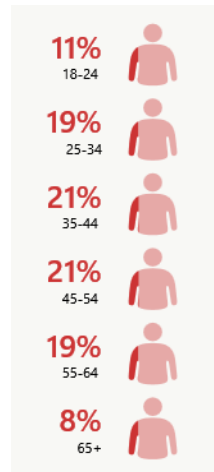
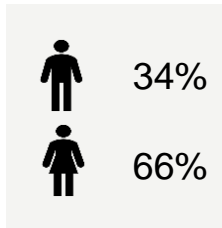
What are the implications in relation to sugar reduction?

Who did we ask?

Consumers

252 consumers (April 2018):

- ✓ Responsible for main grocery shopping
- ✓ No allergies or adverse reactions to foods and drinks
- ✓ Do not limit their drinks/foods intake due to health issues, medical conditions and/or formal diet

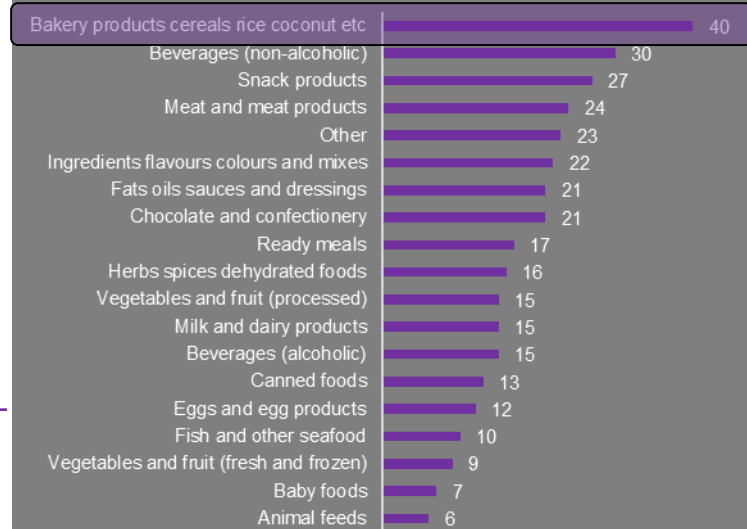


Industry

100 industry members (April-May 2018):

- ✓ 73% Manufacturers
- ✓ 12% Distributors
- ✓ 6% Retailers
- ✓ 6% Caterers

Types of products produced/sold (% of respondents)

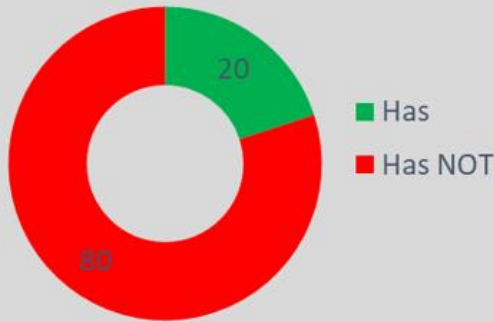


I know the main ingredients of my routine food product purchases.	85%
I consciously try to consume enough fruit and vegetables to ensure that I reach my 5-a-day target.	82%
I consciously choose healthy foods or healthy meal options in main grocery shop.	82%
I buy certain foods because I believe they help maintain healthy bodily functions.	77%
I consciously buy foods that are lower in fat, salt and/or sugar	76%
I prefer to buy foods that are free from artificial colourings and preservatives.	75%
I always look at the list of ingredients when buying a food product for the first time.	74%
I do pay much attention to health or nutritional information on food packaging.	74%
I tend to buy foods that help me lose weight	38%
I tend to buy whatever food is cheapest	27%

So, what did our survey tell us
from an industry perspective?

Lots of products, little clarity

Proportion of respondents whose company has a definition/policy for 'clean label' (%)



NATURAL

'Natural'
'No additives, no E numbers'
'Free from artificial preservatives, sweeteners, colours & flavourings'
'Free from artificial colours & flavours, non-modified starches, "store cupboard" ingredients'
'Without ingredients that would look like a "chemistry set" on the back of packaging ingredient dec'
'Only natural additives, no artificial colours or flavours allowed'
'Does not contain artificial colours, preservatives and flavourings. No added sugar'
'Free from artificial colours, flavours and preservatives'
'Minimum number of ingredients. Natural or from natural origin (no chemicals)'

FAMILIAR TO CONSUMERS

'Ingredients normally available in a domestic kitchen'
'Product made from natural ingredients and ingredients that consumers can identify with and understand when reading the label'

DEPENDS (ON THE PRODUCT) ...

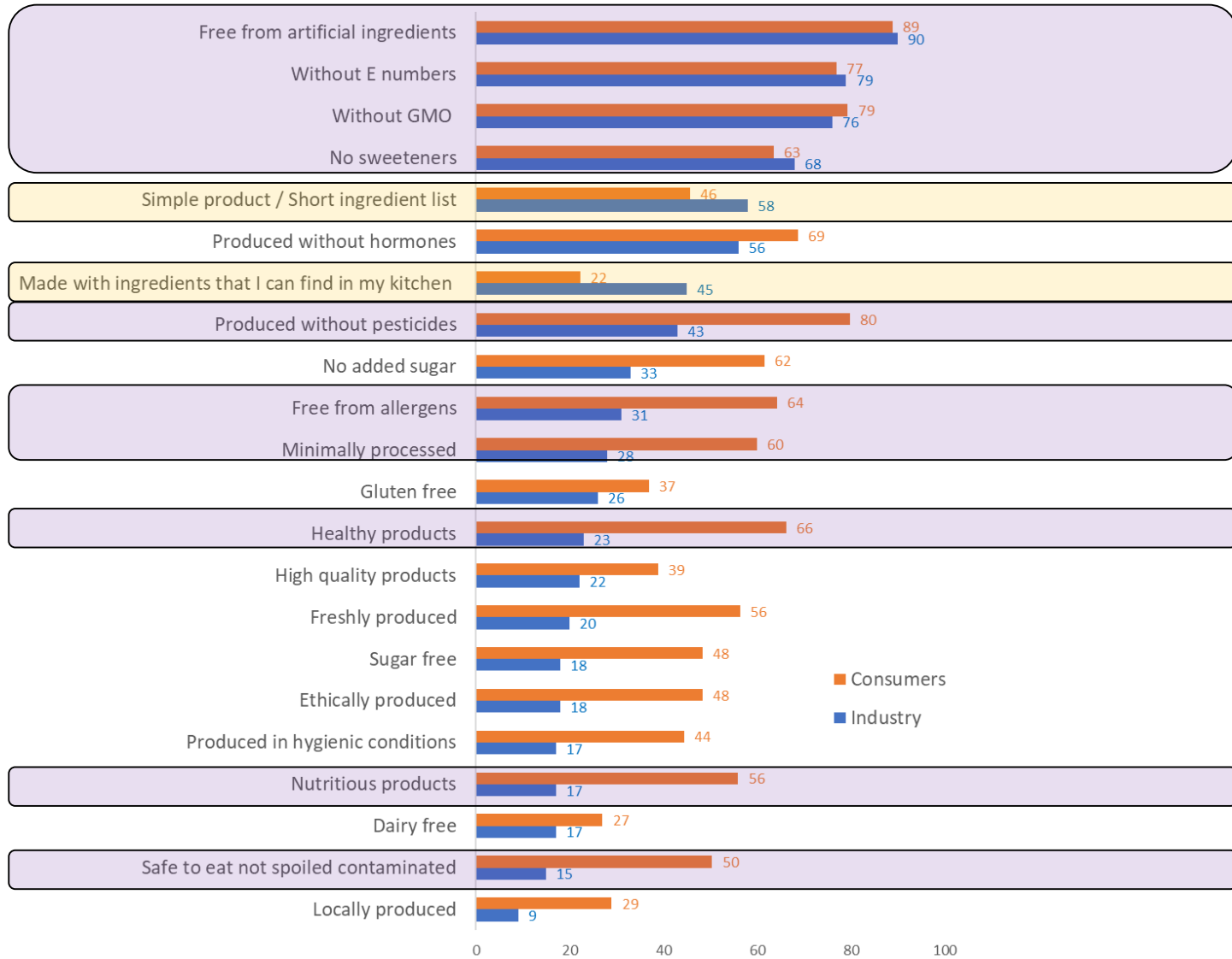
'Depends on specific claims, e.g. preservative free, free from dairy, etc'
'An unprotected claim. Short as possible ingredient list, use of natural sounding ingredients, ideally no e-numbers, salt targets below FSA 2017, no preservative where possible and GMO free'

Do you have a definition?



When considering a definition,
its important to understand
what consumers think

Product characteristics associated with 'clean label' : Industry vs. Consumers
 (% of respondents)



Summary

- Most businesses don't have a clean label policy
- Those that do may not be in line with what their consumers actually think
- Consumers and industry have different definitions of “clean label”

So is there a legal definition?

- Legal definitions or guidance exist for a number of areas that have been highlighted:
 - Free From Regulation (EU) No 828/2014
 - Low/Reduced fat/sugar/energy Regulation (EU) No 1047/2012
 - No added..... Regulation (EU) No 1047/2012
 - GMO labelling Regulation (EU) 1169/2011 and Regulation (EC) 1830/2003
 - Organic labelling The Organic Products Regulations and Regulation (EC) No 834/2007
 - Natural FSA Guidance Document

No specific legal definition of clean label

Important is the principle of
not deceiving a consumer

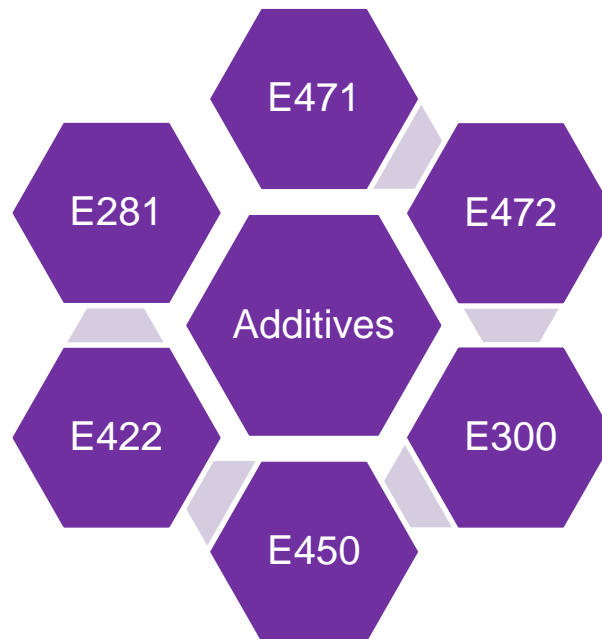
Products must be what they
claim to be

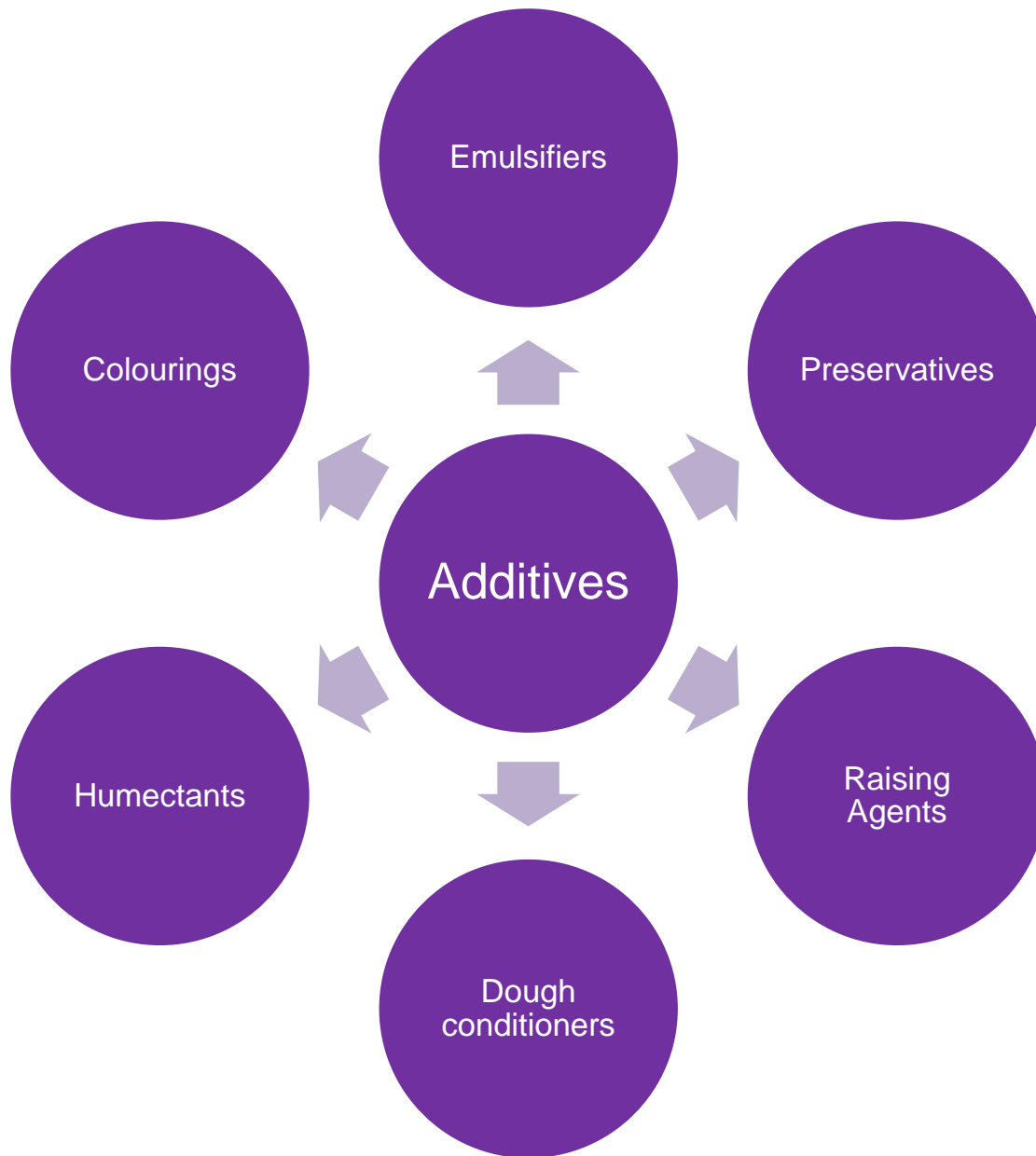
Clean label and Bakery

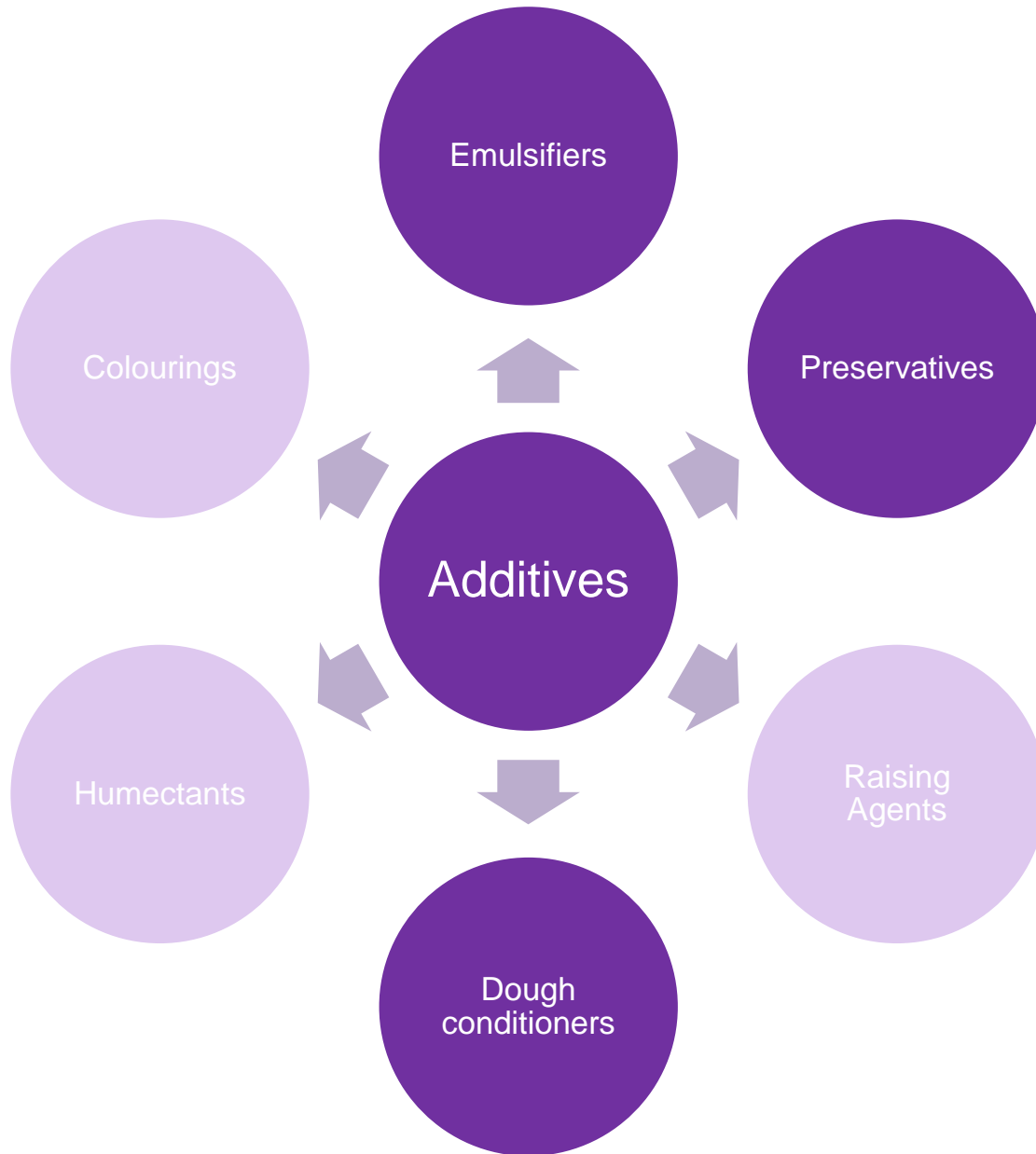
Additive Replacement

79% of consumers think “no e-numbers” is clean label

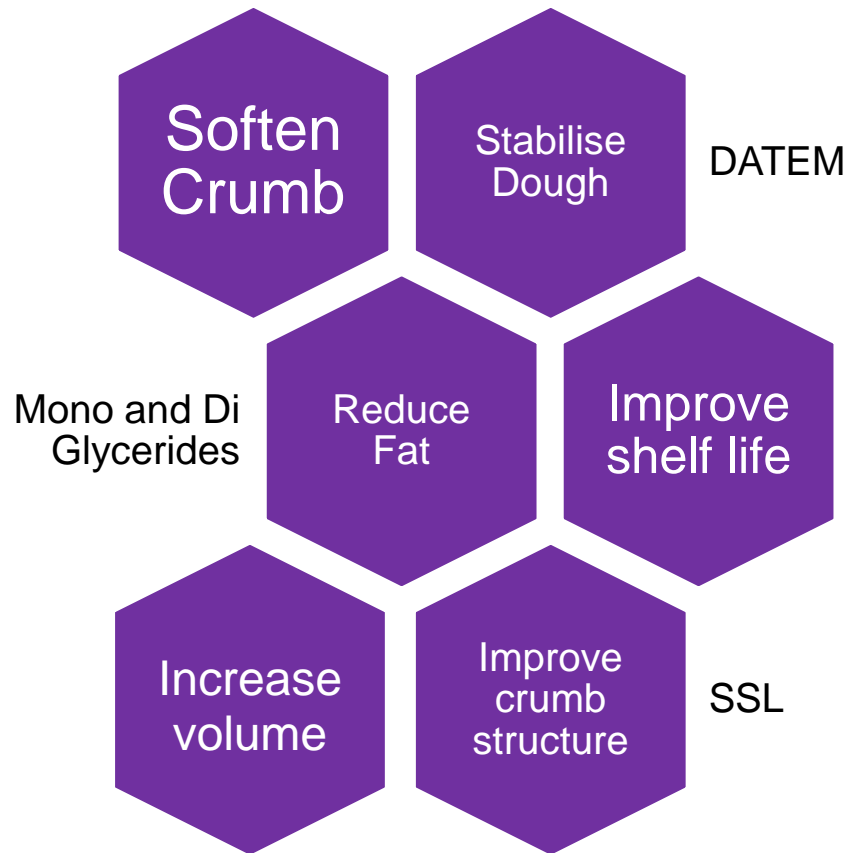
Typical additives used in bakery



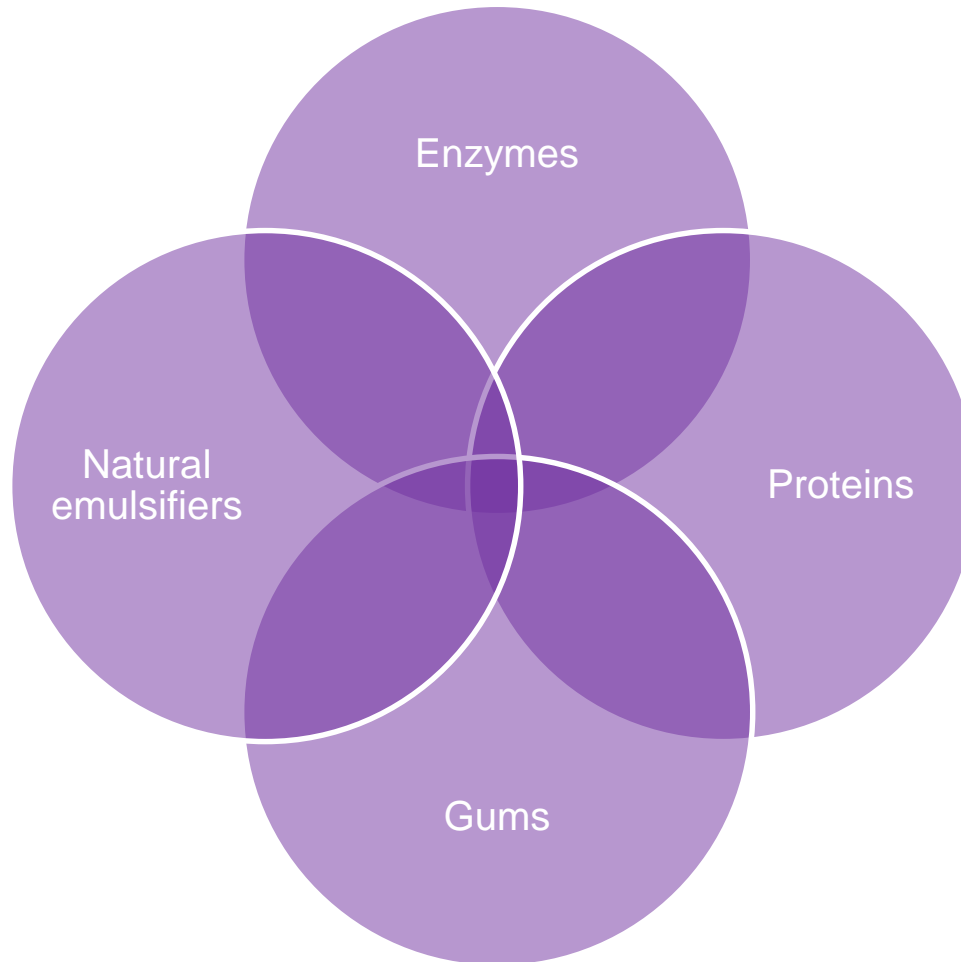




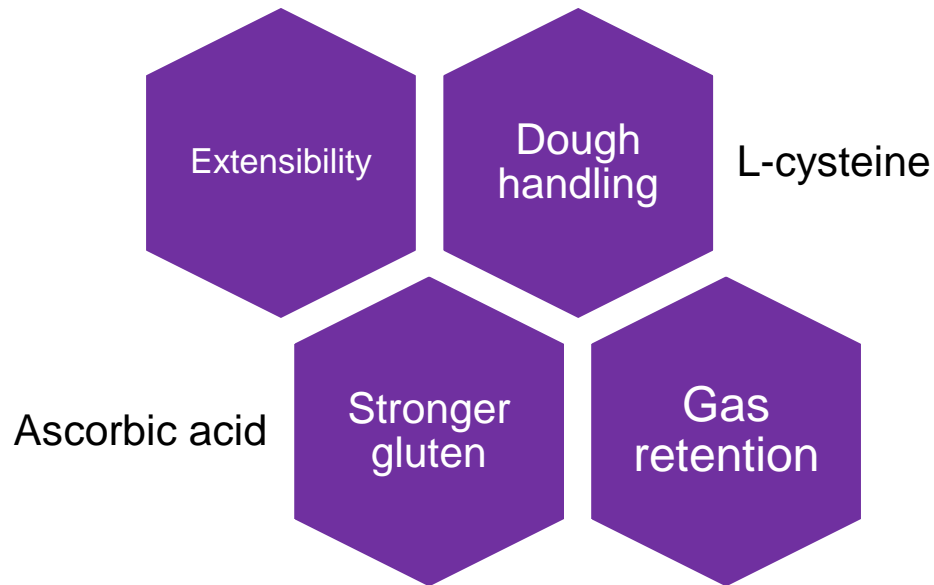
Emulsifiers



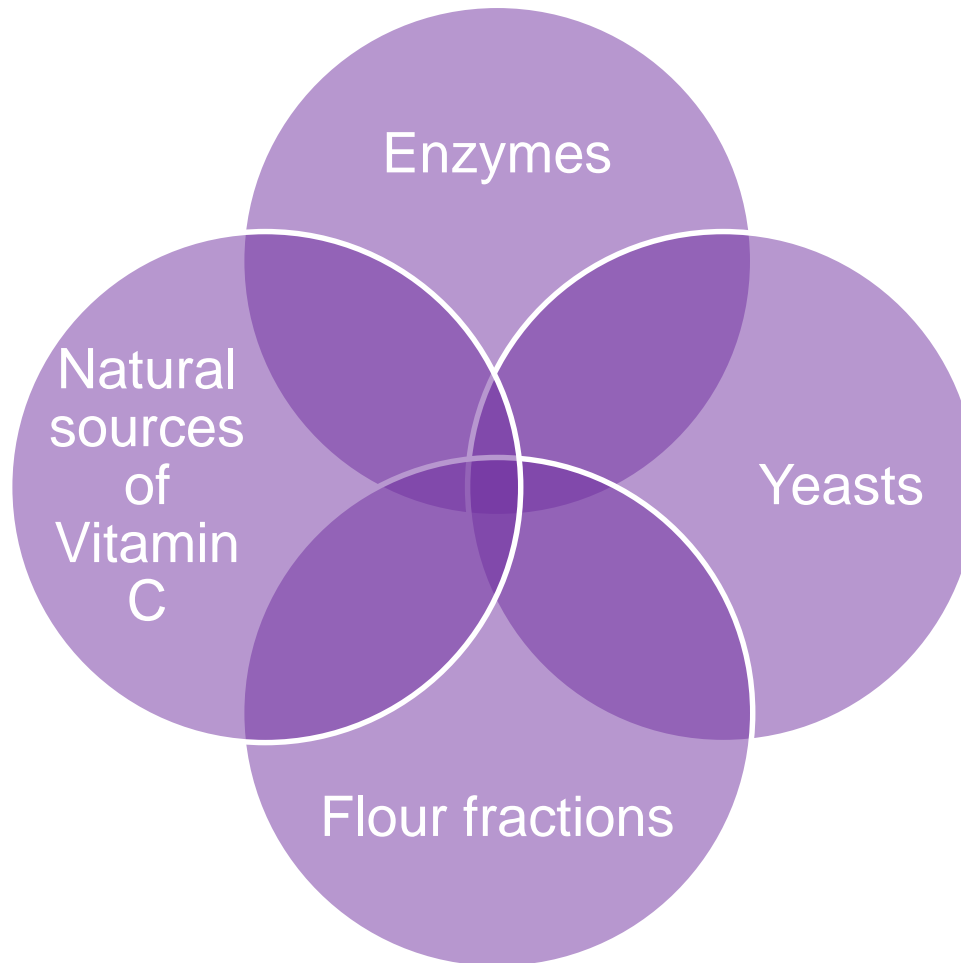
Clean Label Alternatives to Emulsifiers



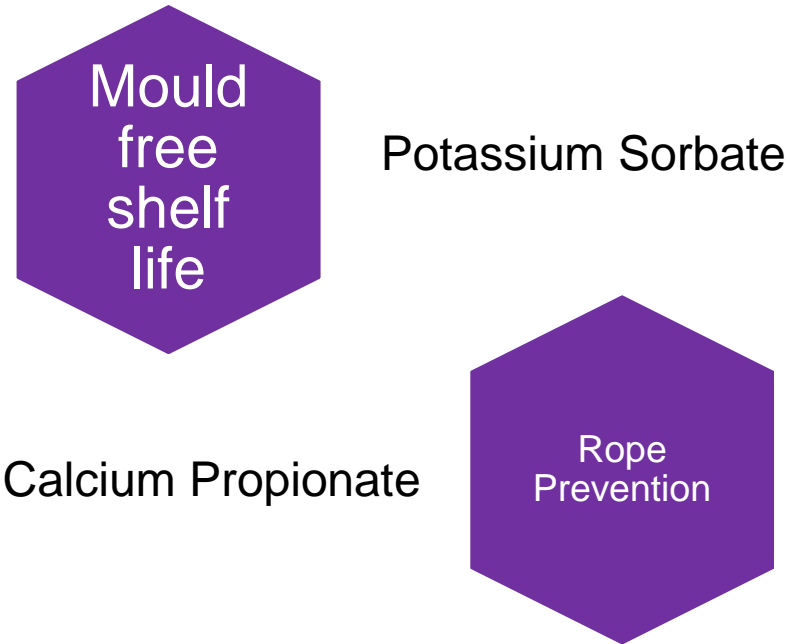
Dough Conditioners



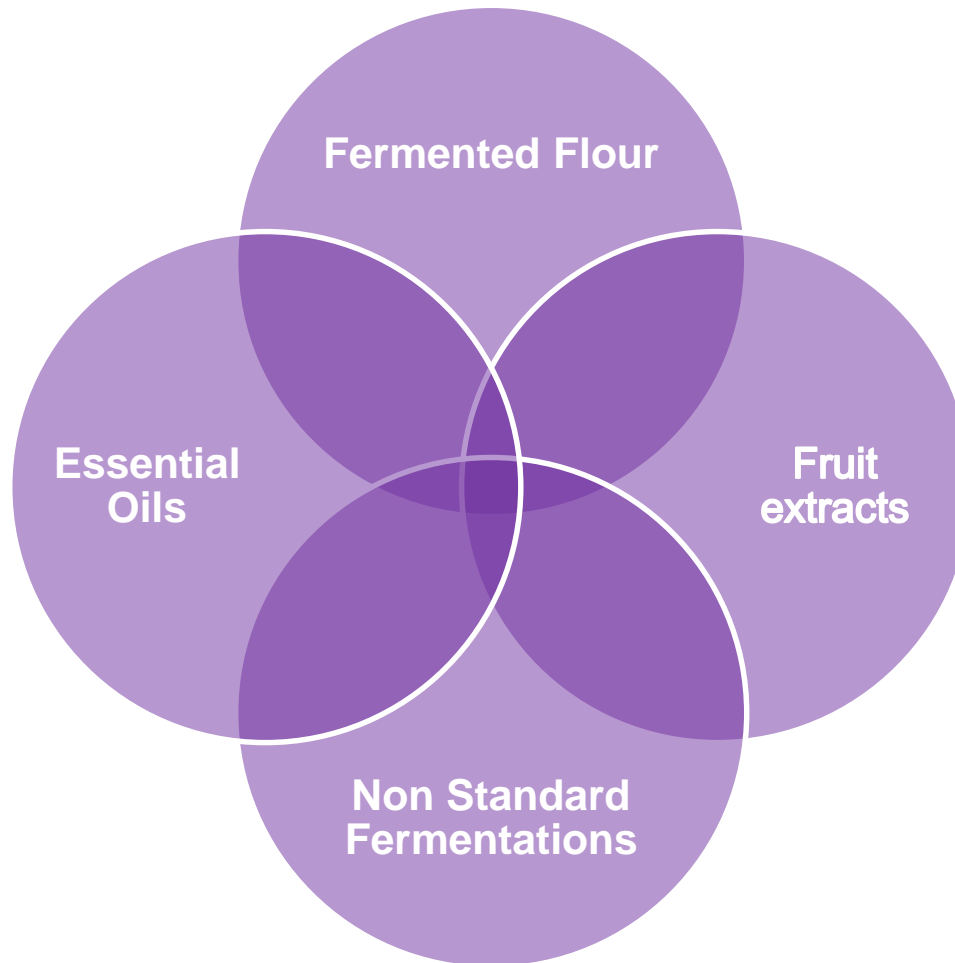
Clean Label Alternatives to Dough Conditioners



Preservatives



Clean Label Alternatives to Preservatives



Additive Replacement- Sugar reduction

Sugar is clean label

Some more than others



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Our consumer research showed:

- No Sweeteners
- No e-numbers
- No artificial ingredients
- No added sugar

Options?

Not many

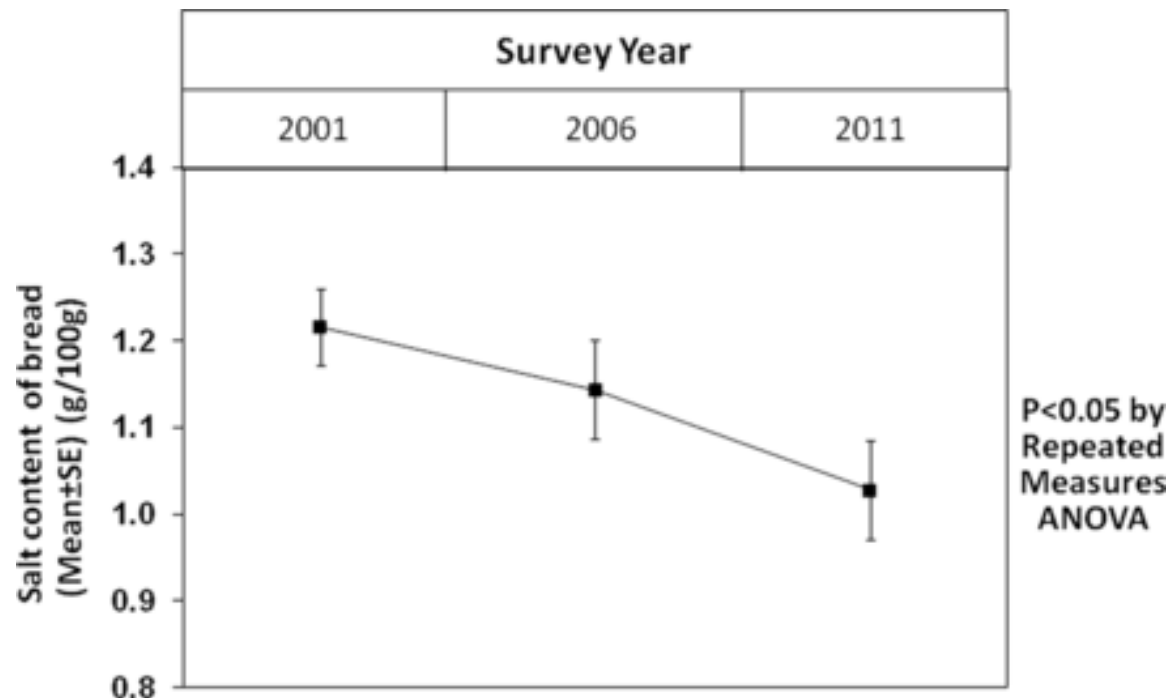
Inulin or chicory root fibre is a common approach to reduce sugar

However, a reduction of 20% of sugar with no replacement may be possible in many sweet bakery goods without affecting consumer liking significantly

Recipe may require rebalancing to ensure calorie and saturated fat levels to not increase

Clean Label Salt Reduction

- Bakery industry has taken massive strides to reduce salt
- Reduction not replacement has been main tactic



Clean Label Salt Reduction

- Bakery industry has taken massive strides to reduce salt
- Reduction not replacement has been main tactic
- Raising agents and dairy products remain significant source of sodium
- SACN-COT stated that increase in potassium may be beneficial for health
- Potassium based raising agents may be an option

Summary

- Clean label is not a consistent term. It means many things to different groups
- Baking industry may be missing areas that consumers consider important
- Communicating clean label credentials can be tricky, as numerous pieces of legislation apply
- Many functional ingredients used in baking are not clean label, and alternatives are predominantly less effective, and more expensive