

Increasing Whole grain Consumption

A manufacturers perspective

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Who is Nestlé Breakfast Cereals (CPW)?

JOINT VENTURE



HQ



ESTABLISHED

1990

WE OPERATE IN

130+



COUNTRIES

MORE THAN

25

years

PROVIDING
NUTRITIOUS
BREAKFAST
CEREALS

We have

4,600

employees



17

factories



4

R&D centres



Regional offices:

- London
- Lausanne
- Dubai
- Mexico city



What do we wake up for everyday?

We Make Breakfast **Better**



BETTER FOOD



BETTER LIVES

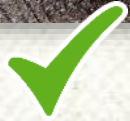


BETTER BUSINESS

Our competitive advantage: Whole grain



Our commitments



LESS SUGAR



**MORE WHOLEGRAIN
HIGH/ NATURAL FIBER**

at least 8g of whole grain per serving size*.



**NO ARTIFICIAL
FLAVORS &
COLOURS**

MORE
Whole
GRAIN
than
ANY OTHER INGREDIENT



- ✓ Whole grain as number 1 ingredient
- ✓ Fortification with Vitamins and Minerals
- ✓ Less than 2 tea spoons of sugar per serving
- ✓ Less sodium per serving

We have been reformulating since 2005!

- ✓ Added over **25 billion servings** of Whole Grain²
- ✓ Removed more than **9,000 tons** of salt
- ✓ Removed more than **120,000 tons** of sugar

Addi
grain
wh

by 5,041 tonnes

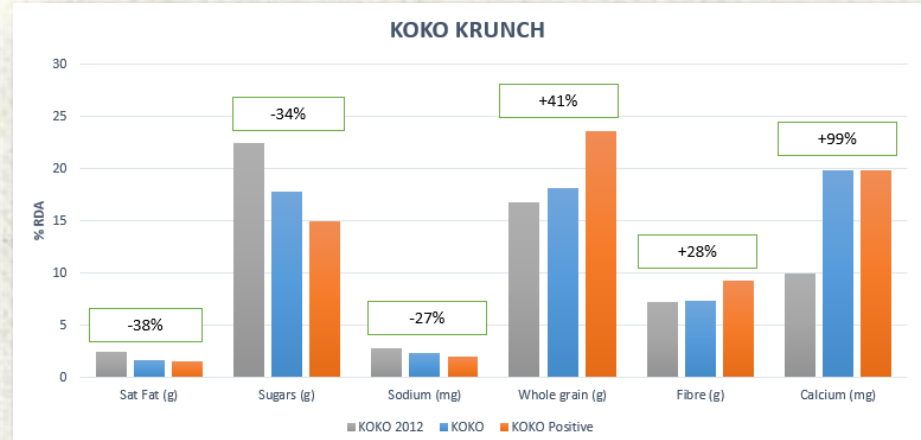
by 26,907 tonnes

by 20,000 tonnes

Nestlé Breakfast Cereal offering in Indonesia



Continuous reformulation journey



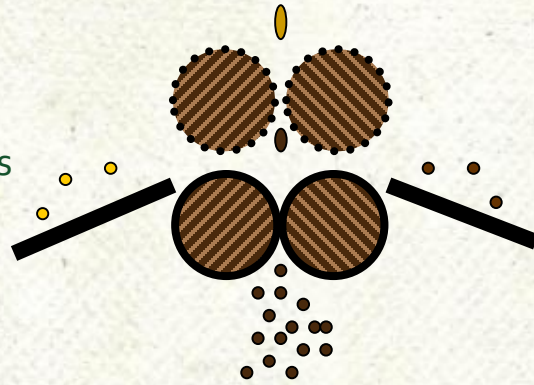
What are Whole
grains and why do
they matter?

WHOLE GRAIN VERSUS REFINED GRAINS

The Mill

- Loss of
 - lipids
 - vitamins
 - phytochemicals (phytosterols)

- Loss of
 - fibre
 - vitamins & minerals
 - protein
 - phytochemicals



Germ



Refined white flour

- Better handling/processing properties
- Consistent composition
- More desirable organoleptic properties

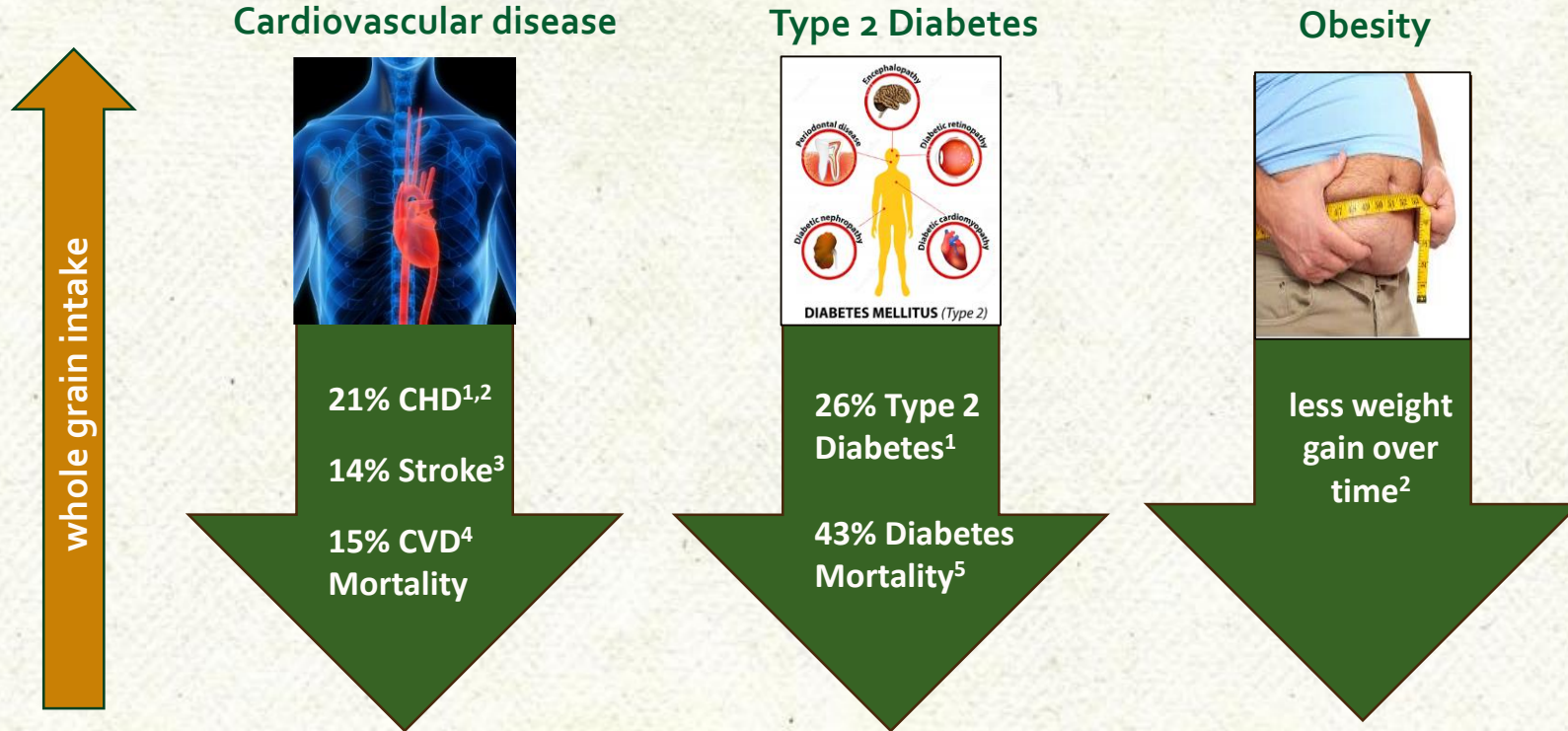


Bran



The outer bran layer and germ of the grain are stripped away.

Whole Grain Consumption is associated with a lower risk of chronic diseases



¹ Tang et al 2015, ² Ye et al 2012, ³ Fang et al 2014, ⁴ Wu et al 2015, ⁵ Huang et al

Whole grain consumption is associated with a more favourable diet quality in children



Increasing whole grain intake



Iron Magnesium potassium
Phosphorous B vitamins

Fibre



- ✓ Bellisle et al (2014) *Br J Nutr* **112**(10), pp. 1674–1684
- ✓ Devlin NFC et al. (2013) *Br J Nutr* **110**, 354-362
- ✓ Albertson et al. (2016) *Nutr Journal* **15**:8
- ✓ Mann et al (2015) *Br Jr Nutr* **113**(10), pp. 1595–1602

From what sources?



Top whole grain sources



Why are
consumers not
choosing to eat
more Whole Grain?

IN 2017 CPW HAS DONE 3 PIECES OF RESEARCH TO LEARN MORE ABOUT THIS QUESTION

Qualitative focus groups



3 countries:



N=72 Mums with Kids aged 6-12y
Mix of cereal and non-cereal users

Fielded: March 2017

Video interviews



4 countries:



N=16 Whole grain non-rejectors

Fielded: October 2017

Online survey



11 countries:



N=16,000 General Consumers

Fielded: October 2017

WHY AREN'T CONSUMERS ASKING FOR MORE WHOLE GRAIN?

1. THERE IS CONFUSION identifying **WHOLE GRAIN OPTIONS**
2. They **DON'T FULLY UNDERSTAND THE BENEFITS**
3. They **DON'T** think IT WILL **TASTE GOOD**
4. They don't know **HOW MUCH** they should be eating



What are Indonesians having for breakfast



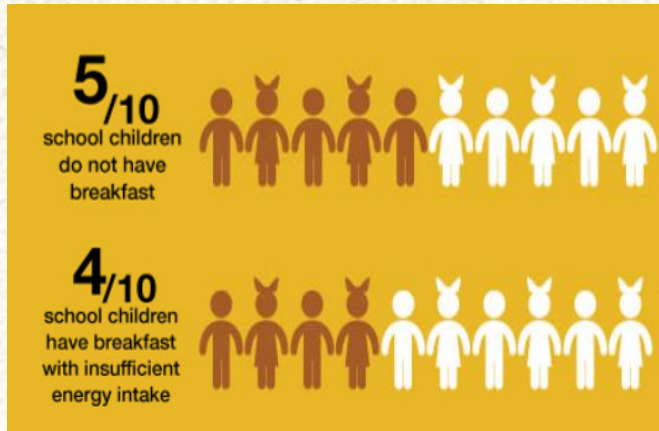
FRIED RICE



CHICKEN PORRIDGE



KOKO KRUNCH



How can we
improve the supply
of Whole Grain
options?

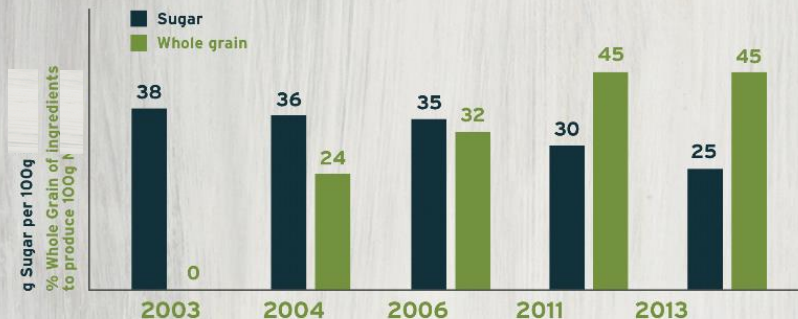
Approaches to increasing Supply of Whole grain options

Innovation



Renovation

Historical KoKo Krunch in 2003, 2006 and 2013 in Europe



Breakfast Cereal Standards

Developing *ready to eat cereal standards* with a clear definition and minimum amount of cereals identified.

Basic requirement: minimum amount of cereal is 50%

Develop *whole grain ready to eat cereal standard* with a minimum percent of wholegrain

Basic requirement:

- **Minimum whole grain cereal is 25%**
- **Minimum dietary fiber is 3g/100g**

Technical Challenges

Taste

WG can taste "bitter"



Adjust process to improve flavour development or change cereal recipe

Texture

WG delivers a softer "bite" due to the lower starch and higher fibre content



Adjust process to improve flavour development or change cereal recipe

Appearance

WG makes the cereal appear more "brown"



No solution unless product is coated e.g. in a cocoa syrup

Shelf life

WG naturally contains more fat than refined grain



Freshly mill grains
Use antioxidants
Use preservatives

Quality

Seasonal variations in grain quality impacts processing



Developed in-house expertise after many years of making WG cereals

ADDS COST & COMPLEXITY

So why do we not see more manufacturers choosing to innovate and renovate with whole grains?

TECHNICALLY
MORE DIFFICULT

+

LOW CONSUMER
DEMAND

=

LOW INCENTIVE

- Absence of Standards to lend protection
- Absence of claimable benefit

So how to increase Whole Grain Consumption?

Create more Consumer Demand by:

Helping consumers identify which foods contain whole grain

→ Create consistent labelling of wholegrain options

Educating on the benefits of whole grain

→ Help them understand *why* they should be selecting whole grain foods

Helping them understand how much they should be eating

→ Develop a quantitative recommendation on wholegrain intake

Create more Incentives for manufacturers:

Develop minimum standards for wholegrain labelling

→ Guides product development and ensures a level playing field for all

Create more opportunities for communication

→ Logos, claims etc



A close-up photograph of golden wheat stalks in a field, with the text "THANK YOU!" overlaid in the upper right corner. The wheat is in sharp focus, showing the texture of the grains and the structure of the heads. The background is a soft, out-of-focus green and yellow, suggesting a bright, sunny day. The text is in a bold, dark red, sans-serif font.

THANK YOU!