

INNOVA MARKET INSIGHTS

Cut the Salt, Keep the Taste!

Food manufacturer initiatives in salt reduction have continued to gather momentum in recent years, according to the **Innova Database**, which recorded nearly 3,000 global food and drink launches marketed on a low-sodium platform in 2009, double the level in evidence just 3 years ago in 2006.

High salt consumption levels have become a key health concern in a number of countries and have been the focus of attention from many of the leading food and drinks companies globally as they strive to improve the nutritional profile of their brands. Reduction in salt levels in products has been apparent across a wide range of product types, including traditionally high-salt products such as salty snacks. Bread, breakfast cereals, ready meals and prepared foods of all kinds, including soups, sauce, gravy and baby foods, have been targeted as well.

The USA and the UK have noticeably dominated activity in this area, reflecting the greater levels of concern over health issues, but initiatives by some leading multinationals have resulted in changes on a multi-country or even international level. Unilever claimed to be the first company to set worldwide goals for salt reduction across its entire foods portfolio of over 22,000 products. There have also been significant changes by major companies on a regional level. One of the most recent initiatives highlighted in early 2010 has been Kellogg's announcement of its 30% reduction in salt levels in Rice Krispies and Corn Flakes cereals and snacks across Europe. It claims this is part of an ongoing reduction process started in 1998 that has already seen at least a 50% reduction in salt levels in its major cereal brands.

Although Kellogg's initiative is Europe-wide, it will clearly have the most impact in the UK, where per capita consumption of breakfast cereals and cereal snacks is much higher than in Continental Europe. UK is at nearly 7 kg, compared with about 2 kg in France and Germany. Developments in salt intake reduction in the UK have been driven by reduction targets issued by the UK Food Standards Agency, which revised these further downward in mid 2008, to the professed concern of some manufacturers in terms of the technical challenges associated with maintaining safety and quality.

According to the Food and Drink Federation, however, new formulations are making a difference to consumers, with the salt content of food bought in UK supermarkets reducing by the equivalent of nearly 8,000 tonnes over the two years to September 2009. Kellogg's claims that its recent salt reduction initiatives will further reduce the UK's annual salt intake by about 300 tonnes. Overall levels of salt reduction activity in the UK are also reflected in the fact that one-fifth of all the 2009 launches marketed on a low-sodium platform recorded by **Innova** were in the UK.

In the USA, the reduced-salt foods market is more developed, reflecting the larger processed foods market as a whole, as well as high levels of interest in health. The USA accounted for nearly one-third of the low-sodium launches recorded by **Innova** in 2009. Another source values the market for sales of foods claiming to be low in salt or sodium to be worth about USD12bn per year. One of the high-profile salt reduction sectors has been soups, pioneered by market-leading Campbell Soup, whose reduced-sodium lines launched in 2006 were highly successful. These were subsequently extended to include 'low-sodium', '25% less sodium' and 'Healthy Request low-fat soups with less sodium' ranges. More recently, and perhaps more significantly, Campbell's initiatives took a new turn with the summer 2009 launch of a low-salt version of its flagship condensed tomato soup brand. This was claimed to be the first reformulation for the brand since its launch in 1897, and it now contains natural sea salt, allowing a reduction in sodium from 710 mg to 480 mg per serving, which is the level designated as 'healthy' by the US government.

Campbell's has also been active in salt reduction for other key brands in the USA, with 2010 initiatives already including a 12% reduction in the sodium content of its original V8 100% vegetable juice and its Spicy Hot V8 variant, again down to the government recommended level of 480 mg of sodium per serving.

Innova Market Insights' Head of Research, Lu Ann Williams, believes that the salt reduction trend is set to continue. "While still controversial and highly-debated in some circles, salt intake reduction is clearly increasingly being seen as a public health and nutrition policy priority, particularly in North America and Europe and this is being reflected in initiatives from many of the world's leading food and drinks companies now facing up to the challenge of reformulating many of their most popular brands to meet new guidelines, while maintaining the sensory profiles that their huge and devoted fan bases have come to expect."

For further information on the **Innova Database**, the representative for Australia and New Zealand is Glen Wells (Glen.Wells@innova-food.com.au)