

VILIFYING SUGAR - WILL IT HAVE A SWEET ENDING?

IN MARCH 2016, THE UK GOVERNMENT ANNOUNCED THAT A SUGAR TAX WOULD BE IMPLEMENTED ON SOFT DRINKS. THE DRINK INDUSTRY HAS REACTED TO THIS ANNOUNCEMENT AND WHILE MANY SOFT DRINKS STILL CONTAIN HIGH LEVELS OF SUGAR, MANY MANUFACTURERS ARE REFORMULATING.

FOODMAESTRO ANALYZED 2268 SOFT DRINKS FROM 2014-2018 WITH NIELSEN BRANDBANK DATA TO DETERMINE THE IMPACT THAT THE SUGAR TAX HAS HAD SO FAR IN THE DRINK INDUSTRY.

MARKET VIEW OF 2014 VS 2018 SOFT DRINKS

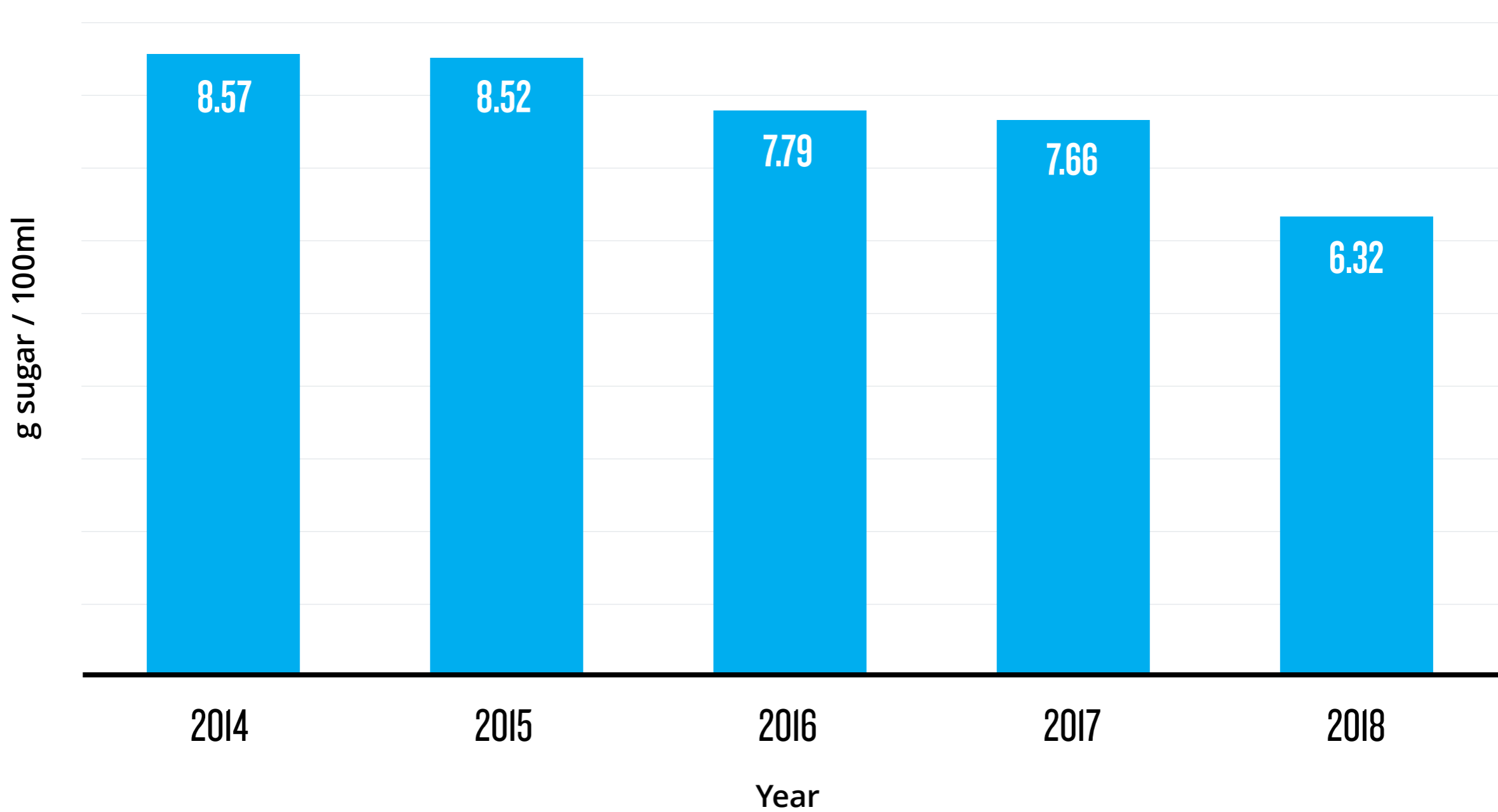
2014 (351 PRODUCTS ANALYZED)		2018 (498 PRODUCTS ANALYZED)	
<5 GRAMS SUGAR/100ML	56%	<5 GRAMS SUGAR/100ML	70%
5-8 GRAMS SUGAR/100ML	11%	5-8 GRAMS SUGAR/100ML	14%
>8 GRAMS SUGAR/100ML	33%	>8 GRAMS SUGAR/100ML	16%

AVERAGE SUGAR CONTENT OF SUGAR-CONTAINING SOFT DRINKS OVER THE YEARS:

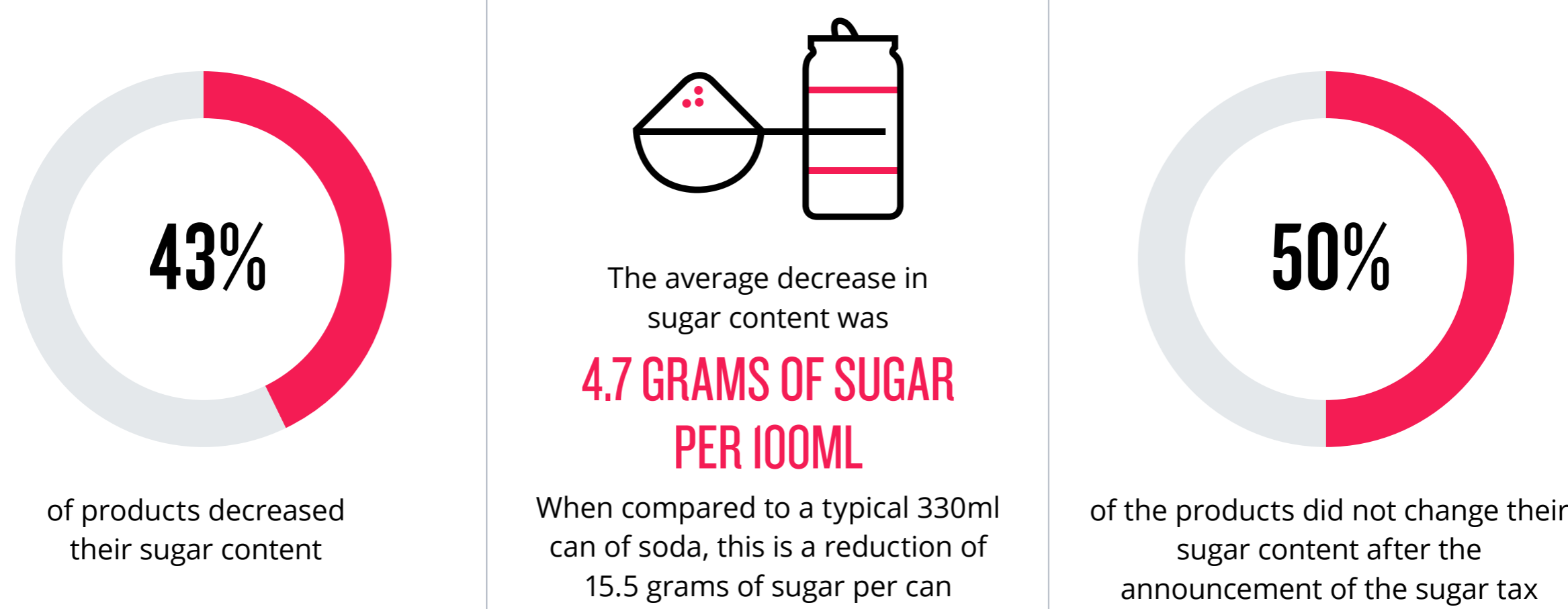
When the average sugar content per year was analyzed of all sugar-containing soft drinks excluding those that contain less than 0.5g sugar per 100g (diet or zero drinks), it is interesting to see a decreasing trend in average sugar from 2014 to 2018. To put it in perspective of the 330ml can of soda, this is an average decrease in sugar content from 28.3 grams per can in 2014 to 20.9 grams in 2018 per sugar-containing can.

AVERAGE SUGAR CONTENT OF SOFT DRINKS PER YEAR

(Diet Drinks Excluded from Averages)

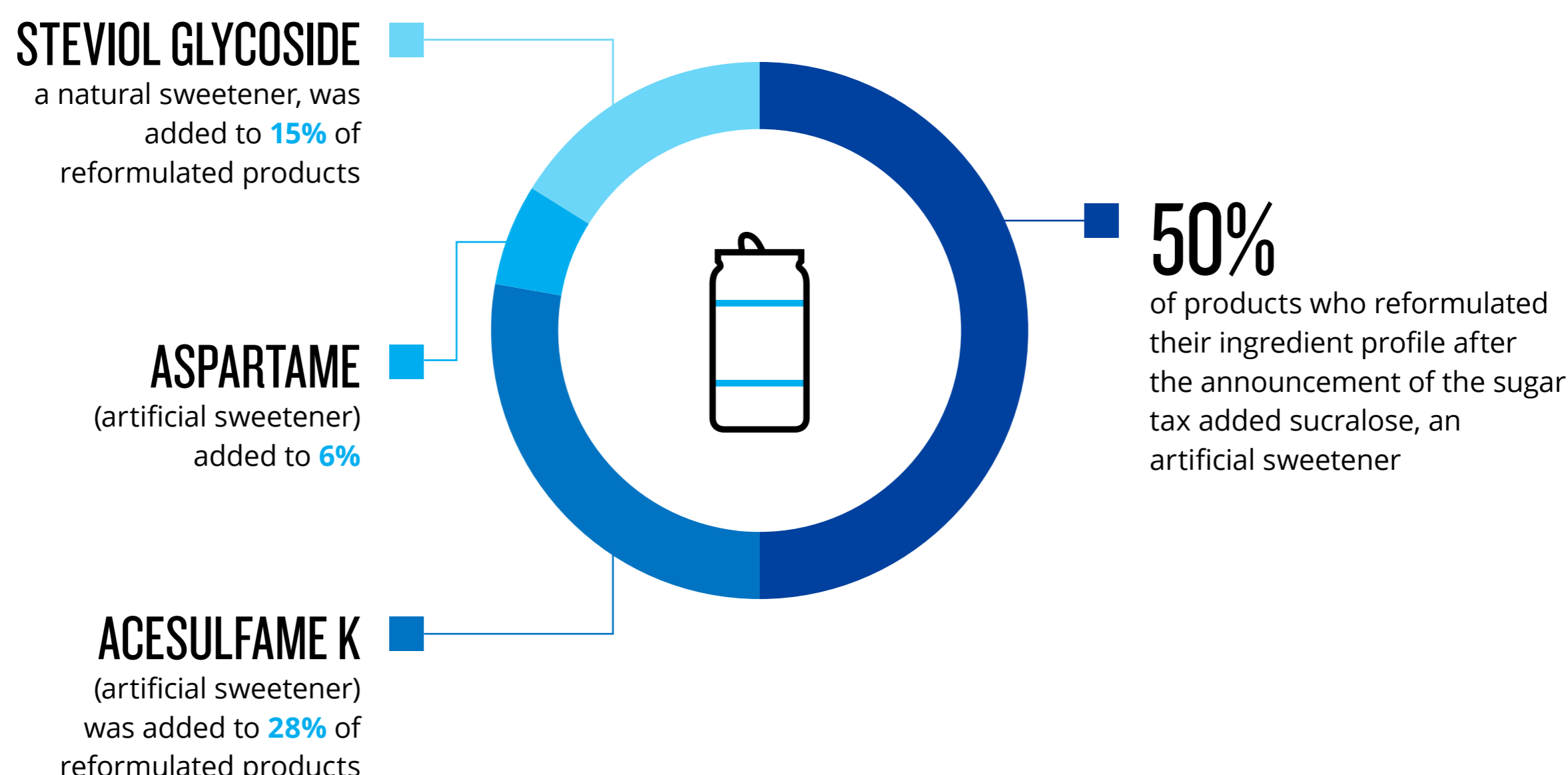


SINCE THE ANNOUNCEMENT OF THE SUGAR TAX IN MARCH 2016



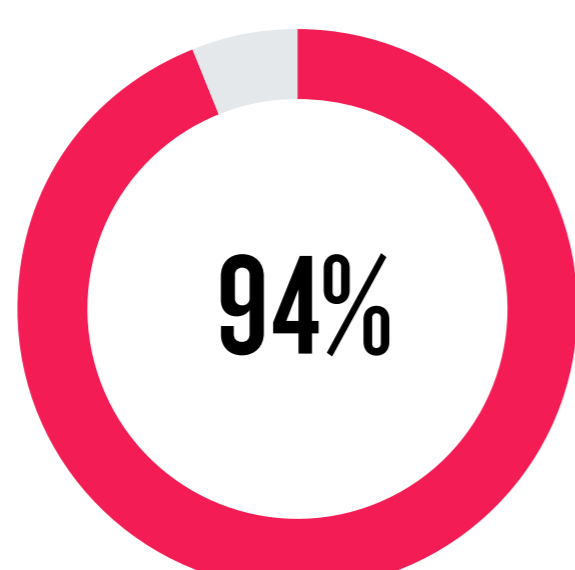
HAVEN'T NOTICED A DRAMATIC CHANGE IN TASTE OF YOUR FAVOURITE SODAS?

The announcement of the sugar tax encouraged many soft drink manufacturers to creatively reformulate their products to decrease the sugar content, without dramatically changing the taste profile.



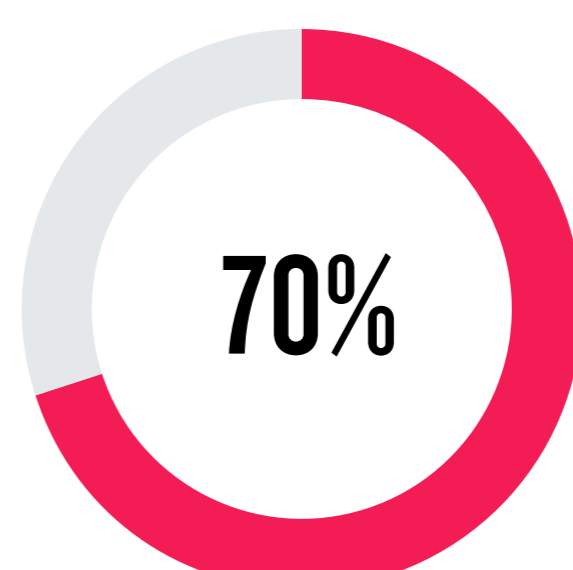
HOW DOES TODAY'S TYPICAL CAN OF SODA COMPARE TO THE SUGAR INTAKE GUIDELINES?

Daily added sugar intake should not exceed 30 grams of sugar per day. One can of soda in 2014 made up



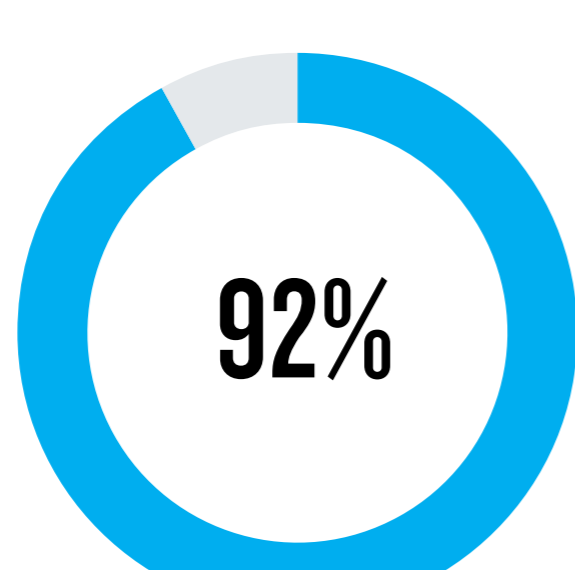
of daily added sugar intake guidelines (with 8.57 grams of sugar/ 100ml).

In 2018, the average sugar content has decreased however one can still makes up an average of

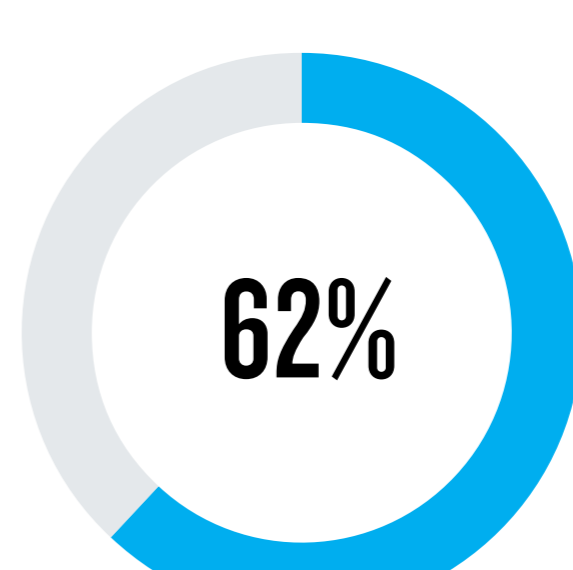


of total daily added sugar intake (with 6.32 grams of sugar/ 100ml).

SHOPPER AWARENESS AND IMPACT ON BEHAVIOUR (FROM NIELSEN DATA)



of shoppers aware of the sugar tax



of shoppers claim they have not changed their consumption behaviour in any way post sugar tax

'STAY TUNED FOR A FULL REPORT COMING SOON FROM NIELSEN BRANDBANK AND FOODMAESTRO'

*Source: This data set included all products available from Nielsen Brandbank data as of September 7, 2018.