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Oqali

A French observatory for the quality of the food supply

April 2023

1 What is Oqali?

Why an observatory is needed?

Eating a balanced diet depends on individual eating patterns as much as it does on the nutritional quality of the foods available to consumers. The food supply changes constantly, whether through changes in products' nutritional content or in the information available on packaging. The French food observatory (Oqali) is in charge of **monitoring the supply of foods on the French market and particularly the changes in nutritional quality of processed foods.**

Oqali was created in 2008 by the Ministries of Food, Health and Consumption to support government policies targeted towards improving the nutritional quality of foods. It is operated jointly by the National Research Institute for Agriculture and the Environment (INRAE) and by the French Agency for Food, Environmental and Occupational Health & Safety (Anses).

Oqali is a key player in the French Food and Nutrition Programme, which covers the initiatives of the French Food Programme and of the French Nutrition and Health Programme.

How does Oqali work?

Oqali conducts regular product surveys in a variety of food categories such as Breakfast cereals, Fresh dairy products and desserts and Ready-to-eat frozen meals. The categories are divided into subcategories combining comparable products, which allows for a very detailed analysis of the nutritional contents of products. For example, Breakfast cereals category contains subcategories such as Chocolate-flavoured cereals, Honey/caramel cereals or High-fibre cereals.

Oqali records **information displayed on processed food** available on the French market, among which energy values and nutrients such as proteins, sugars, fats, saturated fatty acids, salt and fibre contents.

Each product is assigned a brand type as follows:

- **National brands**: global brands such as Danone, Nestlé and Lu, etc.
- **Retailer brands**: private label brands such as Carrefour, Auchan, Système U, Leclerc and Intermarché, etc.
- **Entry-level retailer brands**, first price private label brands: such as Carrefour simple, Bien Vu (Système U), Leclerc Eco+, etc.
- Hard discount brands: such as Lidl, Aldi, Netto, etc.
- **Specialized retailer brands**: such as Picard, Thiriet, etc.
- **Specialized organic retailer brands**: brands exclusively available from organic shops such as Naturalia, La Vie Claire, Biocoop etc.

Oqali's audience

Quantitative information produced by Oqali may be used by:

- **decision-makers** to guide and assess public policies;
- **food producers** to identify areas for improvement of their products' nutritional content and to benchmark their products against their competitors;
- **consumer support groups** to access factual information about changes in food quality.

2 Oqali main findings

Nutritional quality of processed foods: room for improvement remains

The data collected show that there are variations in nutritional values within a given food subcategory. Within the Frozen pastries and desserts category for example, Macaroon sugar contents varied between 38 and 62 g/100 g in 2018. In other words, it is possible to modify the formulations, and thus the nutritional contents, of some of these products.

The French government is currently negotiating with representatives of the food industry in an attempt to implement **new collective agreements** with incentives to improve the nutritional quality of foods. For example, an agreement was signed in 2022 with the bakery sector to lower bread salt content.

First-price products: no difference with other products with regards to nutritional content

The survey of over 16,000 items led Oqali to conclude in 2015 that the nutritional quality of first price products was similar to that of national and retailer brands items. When differences in nutritional content were observed, they did not reflect a general trend.

What was observed in most Oqali monitored food categories, however, was that the range of entry-level retailer branded products was narrower than other types of brands and that these products were less elaborated. For example, in the Fruit purees, compotes and desserts category, there were fewer products with reduced sugar content or with no added sugar than on other types of brands. Entry-level Delicatessen meats also present more simple products.

Trends in nutritional content: some improvements observed, efforts still to be consolidated

Over the last 10 years, the nutritional quality of food products did not deteriorate and the quality of a limited number of foods increased. Such improvements, however, are limited to certain nutrients and food subcategories. For instance, the following trends were observed:

- Trends in food contents consistent with nutritional recommendations. For example, the Breakfast cereals survey shows that the average sugar content decreased significantly between 2011 and 2018 for 9 out of the 16 studied subcategories. A similar trend was found regarding the average salt content for 8 cereal subcategories.
- Opposite trends were observed for Fresh dairy products and desserts. Surveys show that between 2011 and 2017, the average saturated fatty acid content increased for 5 out of the 24 studied subcategories and that the average saturated fatty acid content decreased significantly for only one subcategory. By contrast, average sugar content decreased for 6 out of the 24 studied subcategories.
- The nutritional content of certain food categories, such as Frozen snacking products, remained unchanged.

What measures have been taken by the industry to improve food products?

Oqali surveys show that in general, the food industry uses the following product range development strategies:

- the introduction of new products
- the removal of pre-existing products
- the reformulation of existing products which, in most cases, complies with nutritional recommendations.

Voluntary initiatives within the framework of government-supervised commitments (nutritional progress charters, collective agreements) can lead to changes in the nutritional composition of an entire food subcategory. This has been the case for the Soft drinks (colas, sodas) and Delicatessen meats categories with a reduction of sugar content in the former group and salt and fat content in the latter group. **The impact of such measures on nutrient intakes, however, was limited.** The reason for this is that although improvements have been achieved for some categories of products available on the French market, such trends are too limited to strongly impact consumer nutritional intakes.

Consumers do not always opt for the healthiest foods

The improvement of food supply is not necessarily accompanied by a shift in consumer purchasing behaviours in agreement with nutritional recommendations. Cross analyses of Oqali data on nutritional contents and of Kantar – Worldpanel purchasing data (20,000 purchasing data from a group of households' representatives of the French population), show that as far as the Frozen pizza group is concerned, consumers purchased products with higher fat content in 2015 than they did in 2010. This is a case of consumers opting away from nutritional recommendations -- through the purchase of foods with higher fat/sugar/salt contents – despite a whole food category supply shift towards increased compliance with nutritional recommendations.

On the other hand, scenarios in agreement with nutritional recommendations are observed for other nutrients or food categories. For example, in 2018, consumers opted for Cakes and biscuits with lower salt content than in 2011.

Widespread Nutri-Score usage on the French market

In 2022*, the market share of brands committed to displaying Nutri-Score was estimated at 58% of the processed food. Most of such brands were retailer brands and entry-level retailer brands, with an estimated 98% of their sales volume concerned. By contrast, the commitment of national brands was more limited, with Nutri-Score products estimated to account for 35 % of their sales volume in 2022.

Retailer and hard discount branded products are evenly distributed through the A to E Nutri-Score, whereas a large majority of national branded products have an A or a B Nutri-Score. A possible explanation is that the national brands using Nutri-Score tend to be those selling exclusively top-score products (A or B). By contrast, products from retailers are more evenly distributed throughout the Nutri-Score range because they distribute products from all food categories and have to display Nutri-Score on all products.

*These estimates are based on constant sales volume, taking 2019 as the baseline.

Assessing the impact of Nutri-Score on the food supply: the ready meals situation

Since 2020, Oqali has been complementing food categories analyses by the use of new indexes in an attempt to study:

- potential differences in the nutritional content of products of the same sub-category, with or without Nutri-Score
- the impact of the use of Nutri-Score on reformulation and sales volumes, considering products present in the two studied years, either in an identical or in a modified form.

First, these new indexes were solely used to analyse the Ready-to-eat frozen meals and Ready-to-eat canned meals categories. It was shown that the proportion of such products displaying a Nutri-Score was limited (19 % and 16 % of items respectively).

The number of Nutri-Score products in most of the studied subcategories was too small to assess the impact of Nutri-Score on product reformulation or on sales volumes. In the few cases where this was possible, it was established that products with and without a Nutri-Score have similar trends (between 2016 and 2020). It should be noted, however, that because ready-to-eat meals were already relatively well positioned nutritionally in 2016, the incentive to reformulate was limited.

Gradually, the new indexes will be used to monitor a larger number of food categories in an attempt to assess the impact of Nutri-Score on product reformulation and on sales volumes.

NUTRI-SCORE

A B C D E

3 The international prospects of the Oqali model

Over the last few years, more than 20 European countries have engaged in a process of monitoring and improving the quality of food products following the Oqali model.

The **European Joint Action on Nutrition and Physical Activity** (JANPA) programme, co-funded by the EU Health Programme and coordinated by France (Anses and MoH) between 2015 and 2017, has supported two pilot studies which were conducted to test the Oqali model in Romania and Austria on two food categories largely consumed by children, namely Breakfast cereals and Soft drinks.
The results show that the Oqali scheme is an efficient and economical mean to collect comparable national nutritional data that can be used for domestic and international comparisons.

Based on these results, the European Commission supported the **2019-2022 EU Reformulation Monitoring project (EUREMO) and the 2020-2023 Best-ReMaP Joint Action on Implementation of Validated Best Practices in Nutrition** in order to:

- share at European level the best practices for the creation of a long-term scheme to monitor the nutritional quality of foods;
- provide data to identify the best nutritional formulations for processed foods and assess room for reformulations;
- provide all available data necessary to design, assess and adapt government policies.

Oqali

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