

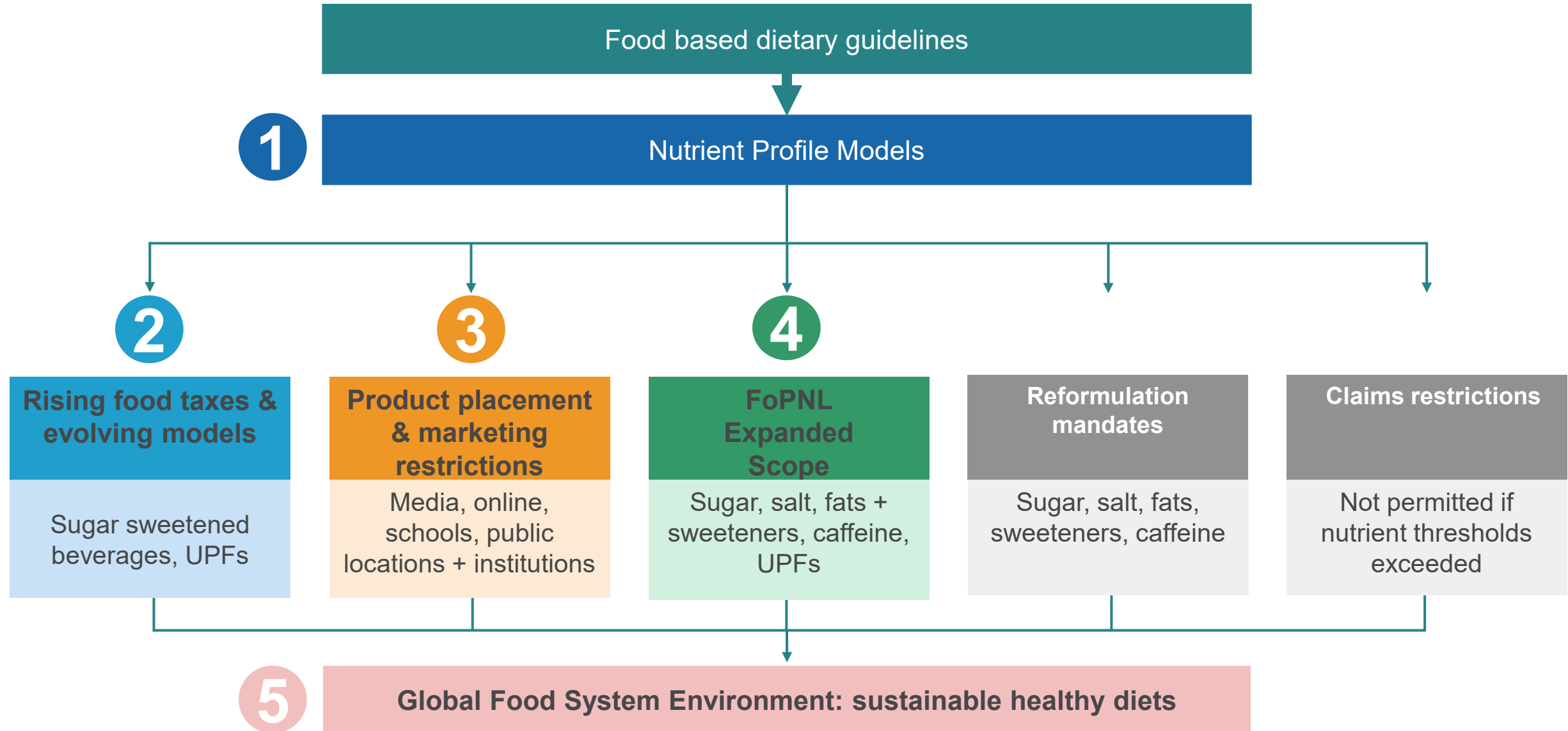
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Global nutrition & other major developments - where regulators are heading next

Vandanna S-Bogers, Consultant

Drivers for innovation and re-formulation



Trend 1: key developments with nutrient profile models (NPM)

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Nutrients of concern category specific models

Category specific

- Nutrients of concern only. Enables more targeted reformulation

Kenya and Nigeria

- Aligned with WHO African NPM
- Tailored by product role: main meal, snack or ready-to-drink beverage
- Broader criteria: sweeteners, food additives, caffeine, ultra-processed foods

India

- Thresholds for nutrients of concern are aligned with Dietary Guidelines for Indians, 2024



Algorithm-based graded summary system

Graded summary score using algorithms

- Nutrients of concern and beneficial nutrients / ingredients

United Arab Emirates

- EU Nutrimark

Singapore

- Expanded Nutri-grade

Australia / New Zealand

- Updated category names, protein and calcium thresholds

Trend 2: rising food taxes & evolving models

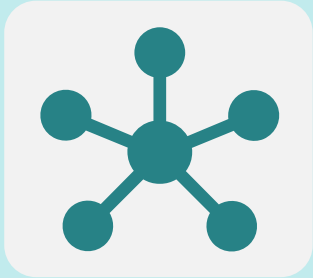
Governments are raising food tax rates and widening their scope well beyond the sugar-sweetened beverages, resulting in increased pressure to reformulate products

INCREASE IN TAX RATES (PHASED) & SCOPE EXPANSION	
Argentina	15% excise duty
Vietnam	Phased SSB Tax implementation: 0% (01.2026); 8% (01.2027); 10% (01.2028) -
Philippines	Bill (2025) proposes PHP 6 to 20/L & PHP 12 to 40/L
Pakistan	Proposes increase 20% to 40% (2025-26 budget)
Colombia	Ultra-processed foods

EXISTING TAXES TRANSITION FROM FLAT RATE		
Nigeria	N10 Per litre	%
UAE	50% flat rate	Tiered by sugar content

Trend 3: product placement & marketing restrictions

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Restricted channels

Nigeria – multi-channel marketing restrictions

- Broadcast
- Non-broadcast
- Location based restrictions

WHO – Creating healthier food environments (UPF)

- Restrict new UPF outlets
- Limit outdoor advertising
- Reduce product prominence



Product placement restrictions

Abu Dhabi

- Nutri-mark C-E products affected
- No store entrances
- No aisle ends
- No online homepages

Mexico

- Stricter media requirements
- Digital platform focused
- Scheduling controls
- New approval processes



UPFs and non-nutritive sweeteners

Chile

- Advertising ban of UPF to children (< 14 years)
- Digital media, online platforms & paid advertisements

Kenya

- Products with non-nutritive sweeteners should not be marketed to children

Trend 4: front-of-pack nutrition labelling

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Transitioning to warning symbols +

Canada: As of 1 January 2026, foods subject to FOP requirements must comply

Chile: Proposal to display the term “ultra-processed” for products with more than 5 ingredients derived from chemical-industrial processes

Colombia: Octagonal warning labels + ultra-processed seal

Ecuador: Health Law reform transition traffic light → warning symbols

India: FoPNL is subject to judicial intervention. Phased red hexagonal warning messages proposed challenged: format and colour, thresholds, phasing



Adopting / adapting summary indicators

Australia: Food ministers request FSANZ to prepare proposal to mandate Health Star Rating system

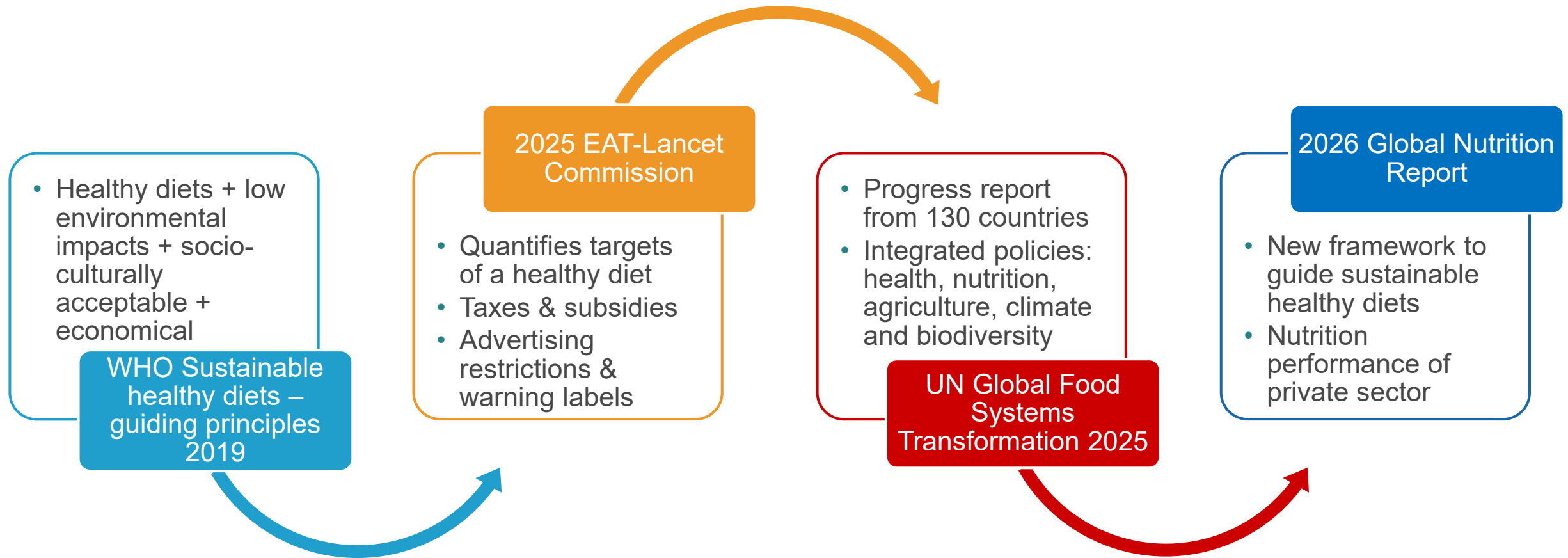
United Arab Emirates (UAE): UAE authorities launched Nutri-mark (EU based) - adapted for local dietary needs (mandatory). It grades nutritional quality from A to E.

Thailand: Updated criteria for ‘Healthier Choice’ certification published. Updated nutrient thresholds required for applicable food categories

Singapore: Expansion of Nutri-Grade system beyond beverages, currently mandatory, to cover other key retail food categories

Trend 5: Global pressure to achieve sustainable healthy diets

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Future actions: innovate for health and planet

Companies may consider

Phase 1: Sound regulatory understanding

- 💰 Prepare for emerging food taxes
- 📢 Adapt to stricter marketing rules
- 🏷️ Prepare for mandatory and broader FoPNL

Phase 2: Robust product pipeline

- 🧪 Meet nutrient thresholds
- 🍴 Reduce ultra-processing
- 🌱 Improve nutrition profile

Phase 3: Sustainability plan

- 🌍 Source responsibly
- 🌿 Accelerate plant-based options

Questions?

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