



JOINT CLUSTER SQUAD MEETING

21 May 2021



AGENDA

- 01** Welcome & Competition Law Caution
- 02 Housekeeping Rules
- 03 Approval of Agenda
- 04 Approval of Minutes from Previous Meeting – 26 Jan 2021
- 05 New Structure Update
- 06 Vietnam Taskforce among Multiple Issues
- 07 Smart Regulation Outcomes & Next Steps
- 08 Singapore: Sodium Reduction Project with Health Promotion Board
- 09 Thailand: HFSS Taskforce & Plan
- 10 Launch of Reformulation Report in China
- 11 Malaysia & Thailand: Regional Reformulation Plans
- 12 Food Contact Materials: Strategy & Plan
- 13 Oxford Economics Update on Launches
- 14 Research Department

COMPETITION LAW CAUTION

“ **All meetings of Food Industry Asia (FIA), including this one, shall be conducted in accordance with the relevant competition and antitrust laws. Members shall not enter into any discussion, activity or conduct that may infringe any applicable law.**

By way of example, participants shall not discuss, communicate or exchange any commercially sensitive information, including non-public information relating to prices, marketing and advertising strategy, costs and revenues, trading terms and conditions with third parties, including purchasing strategy, terms of supply, trade programmes or distribution strategy.

This applies not only to discussions in formal meetings but also to informal discussions before, during and after meetings. Should the meeting discuss matters that fall outside of FIA's legal remit or contravene its competition law policy, the Chairman will close the meeting.

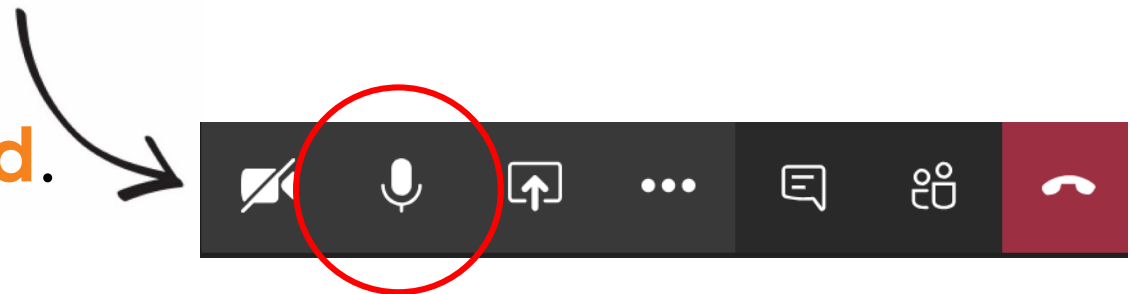
”

HOUSEKEEPING RULES

To minimise interruptions during this meeting, please note that **your mic will be muted.**

Please use the **raise hand feature** on the Microsoft Teams app if you have any questions or comments.

This meeting will be **recorded.**



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NEW STRUCTURE UPDATE



FIA STRUCTURE

 CEO Circles


 FIA Council


 OBs/Budget



Health, Nutrition & Innovation



Regulation, Trade & Safe Food



Sustainability & Resilience

 China

 South Asia

 Fiscal Measures **NEW!**

 High Fat, Salt, Sugar **NEW!**

 Ingredients of Interest **NEW!**

 Halal Food

 Food Safety

 E-commerce


 Codex Coordination

 Ingredients

 Food Labelling **NEW!**

 Flavour Sub-Squad

 Product Packaging

 Food Contact Materials Sub-Squad

Legend:
 Cluster
 Squad

CLUSTERS & SQUADS MEMBER PARTICIPATION



CLUSTERS

- The representatives from premium and full membership paying member companies for each Cluster have been identified.
- The nomination for co-leads of the following Clusters is still open
 - Health, Nutrition & Innovation Cluster
 - Sustainability & Resilience Cluster

(nomination opens for 1 co-lead per Cluster)

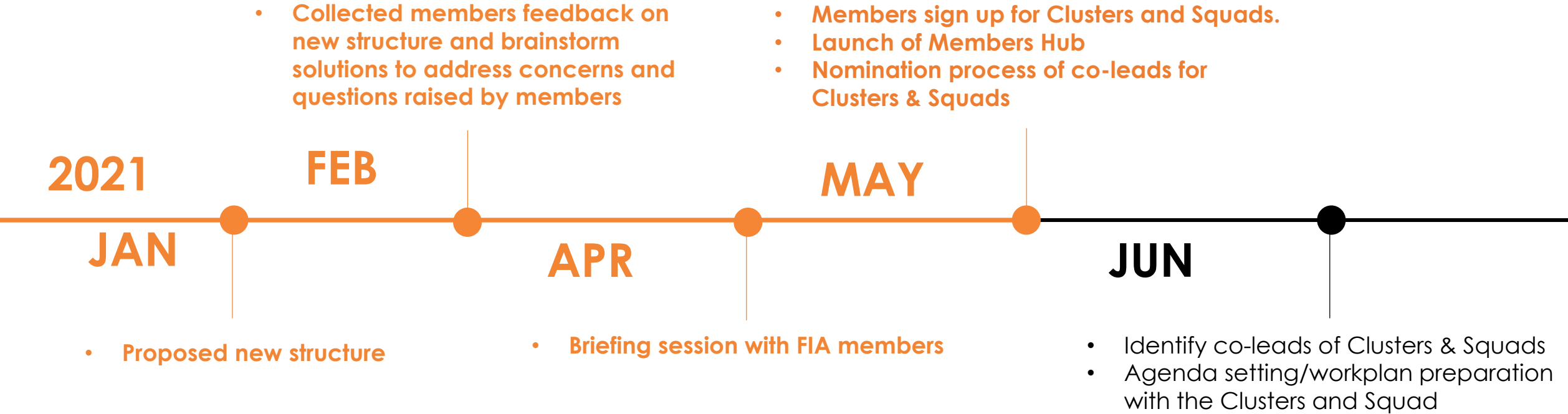


SQUADS

- A total of 258 sign ups have been received. Members interested to participate Squads may sign up via [here](#).
- The nomination for co-leads of the following Squads is still open
 - Fiscal measures
 - Codex Coordination
 - Ingredients
 - E-commerce

(nomination opens for 1 co-lead per Squad)

NEXT STEPS



MEMBERS HUB

Welcome to the Members Hub

THE FIA STRUCTURE

Clusters & Squads

All Cluster Squad

- Health, Nutrition & Innovation
- Fiscal Measures
- High Fat, Salt, Sugar
- Ingredients of Interest
- Regulation, Trade & Safe Food
- Codex Coordination
- E-commerce
- Food Labelling
- Food Safety
- Halal Food
- Ingredients
- Sustainability & Resilience
- Product Packaging
- China
- South Asia

Food Safety

← BACK TO HOMEPAGE

1 Details of upcoming & past meetings (Agenda, Minutes, Slides)

VIEW ALL

Latest Minutes

- 9 July 2020 NEW
- 2 August 2019
- 11 April 2018

NO UPCOMING MEETING

AGENDA SLIDES

2 Contacts (Co-leads, FIA Secretariat in charge, All)

Key Contacts

Name	Organization	Designation
FIA Secretariat ✉ Rachel Wong	FIA	Food Safety & Regulatory Officer

VIEW ALL CONTACTS

3 Purpose & Objectives of Squad/Cluster + Working Plan

Food Safety Squad: Key Objectives

This document provides the key purpose and objectives of the squad, and will include the working plan once it has been finalised.

FIND OUT MORE

4 Relevant FIA resources

Latest Resources

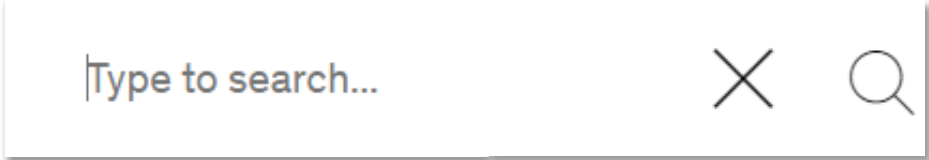
VIEW ALL

- ERIC FIELD GUIDE III: NUTRITIONAL & LIFESTYLE ADVOCACY
- ERIC FIELD GUIDE IV: CRITICAL INCIDENT INTERVENTIONS
- ERIC FIELD GUIDE V: TRUST IN THE FOOD SECTOR
- FOOD FRAUD
- CAPACITY BUILDING BROCHURE - TRAIN-THE-TRAINER PROGRAMME IN VIETNAM

MORE RESOURCES

MEMBERS HUB – NEXT PHASE

1 Create Search function



2 Showcase information on multi-stakeholder platforms



Circular Materials Lab

3 Build Internal FIA documents section (to differentiate internal vs. external)

Internal FIA Resources

VIEW ALL

MORE RESOURCES

External FIA Resources

VIEW ALL

MORE RESOURCES

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**VIETNAM TASKFORCE
AMONG MULTIPLE ISSUES**



VIETNAM ENGAGEMENT

BACKGROUND

Despite enjoying fast speed of business growth, FIA members in Vietnam still face challenges including unclear and non-harmonised food regulations and the lack of industry coordination and alignment on key issues.

THE PROPOSAL – ESTABLISHING A VIETNAM TASK FORCE WITHIN FIA

It is suggested that an industry Taskforce be initiated within FIA, with the participation from both regional and in-country members, to work towards appropriate tactics and actions that can be employed, and channels that can be tapped onto to make inroads in strengthening aligned industry voice in the market.

To drive in-country engagement in Vietnam, specifically to address the pressures and opportunities that are faced in the areas of health and nutrition, regulations, as well as plastics packaging and sustainability. The taskforce may be disbanded when the objective(s) of the engagement is met.

VIETNAM ENGAGEMENT

CURRENT FIA INVOLVEMENT IN VIETNAM

Regulatory: industry inputs on the use of flavours and food additive in response to VFA's review on food additive regulations.

Sustainability: FIA is a strategic partner of PRO Vietnam and we are engaging with them on the draft decree detailing EPR under the Law on Environmental Protection 2020; FIA also worked with chewing gum companies operating in Vietnam to submit views on the proposed levy on chewing gum manufacturers

Fiscal Measures: FIA co-hosted with AmCham to launch and share the Oxford Economics study on the economic contributions of the agri-food sector in Vietnam, and will look to organise a session in 2H21 with Vietnamese regulators on fiscal and regulatory measures that might impact the food & beverage sector

FIA will also work with an engage the Vietnam Taxation WG led by PepsiCo on plans by the government to tax SSBs.

We understand that a sugar tax is being planned and will be made public in June (i.e. first official mention). It will go to the PM's office for review and the draft for public comment will be available in June/July until September (typically a 60-day consultation window). After close of public consultation, it would be sent to the National Assembly in Oct/Nov for review. The tax bill is estimated to be approved by NA by May 2022 and comes into effect in Q4 2022 or Q1 2023. The tax rate is est. to be 10% on SSBs.

VIETNAM ENGAGEMENT

Vietnam Task Force – Engagement Plan

The Task Force will have its kick-off meeting in June to discuss and align on strategy and engagement plan.

Activity	Details	Timeline
Engagement with FIA Members (regional + local)	<ul style="list-style-type: none">Gather inputs on the issues to be prioritized, and engagement plan with local stakeholders.	May onwards
Engagement with NIAs (through FIA and AFBA)	<ul style="list-style-type: none">VCCI, AmCham, EuroCham, VBA with the support from FIA members: with consideration of the fragmentation of food groups in the country, a different tactic / approach may be need for Vietnam, as compared to FIA's way of working in the other markets which relies on only one local industry association.AFBA: Chairman is helping to connect with ASEAN Secretariat to seek their guidance in identifying the most appropriate Vietnam NIA for AFBA to reach out to. VCCI suggested AFBA to connect with other food-related associations since they do not have sufficient food-vertical activity.The ultimate and ideal goal is to set up a Food Group under the VCCI to actively engage and advocate on the issues.	May – Dec 2021
Engagement with other key stakeholders (regulators, academia, etc.)	<ul style="list-style-type: none">Engagement with stakeholders to bring across the strategy developed based on the alignment amongst FIA members.Invitation to FIA's Regulators Roundtable.	Jun – Aug 2021

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SMART REGULATION OUTCOMES & NEXT STEPS



SMART REGULATION

Context & Objectives



With a core role in food policy and advocacy, FIA would like to bring **smart regulations** in Asia.

In this context, several needs came:

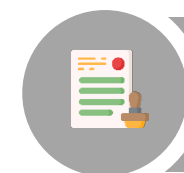
- With regulators: build **new ways to collaborate & engage** to push smarter regulation, **create awareness** of the future of food in APAC
- With members: **go beyond individual needs** and **align collectively** on the **strategy to build for smarter regulations**
- Within FIA: build a **strategic framework of the possible approaches** beyond tactics, onboard the team, challenge, create the right mindset and awareness

SMART REGULATION – OUTCOMES OF RESEARCH

“

A holistic, collaborative, and modern approach to continuously improve regulations to be agile, more effective and efficient to reduce administrative burden, facilitate trade, and ensure safe, quality, nutritious and accessible food in a sustainable way

”



DEFINITION



OBJECTIVES OF SMART REGULATIONS

Protect Consumers

- Enable safe, quality, nutritious and accessible food in sustainable way for consumer
- Provide transparency, accessibility & connectivity towards public and consumers to improve consumer trusts
- Promote consumer empowerment, education, and informed choices/decisions on food products

Protect Consumers

- Improve effectiveness and efficiency by having easier workflows for regulators
- Help regulators to focus the resources and guide them on the more important/impactful issues
- Reduction of regulators administrative burden and costs

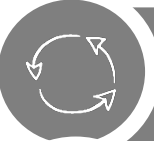




Protect Consumers

- Improve effectiveness and efficiency by simplifying the regulations for ease of doing business
- Promote harmonization to facilitate demand and supply, cross border trade
- Regulation to catch up with consumers change/trends to be applicable for today and future needs
- Improve cooperation and mutual recognition between stakeholders




SMART REGULATION – OUTCOMES OF RESEARCH

8 CORE PRINCIPLES OF SMART REGULATION

EXISTED IN GOOD REGULATORY PRACTICE CORE PRINCIPLES

	Holistic approach	Holistic approach throughout the regulatory/policy cycle from impact assessment to evaluation/review/fitness check of regulation
	Efficiency and simplification	Simplification of regulations and promotion of harmonization, equivalence, and mutual recognition including outcome/risk-based regulation
	Stakeholder collaboration	Collaborate with different stakeholders including gov't, private sectors, association, and public through consultative approach
	Science & evidence-based approach*	Regulations and policies should be developed based on sound science and evidence and not arbitrary
	Transparency and accessibility	Regulation to be transparent and accessible easily for public and private sectors

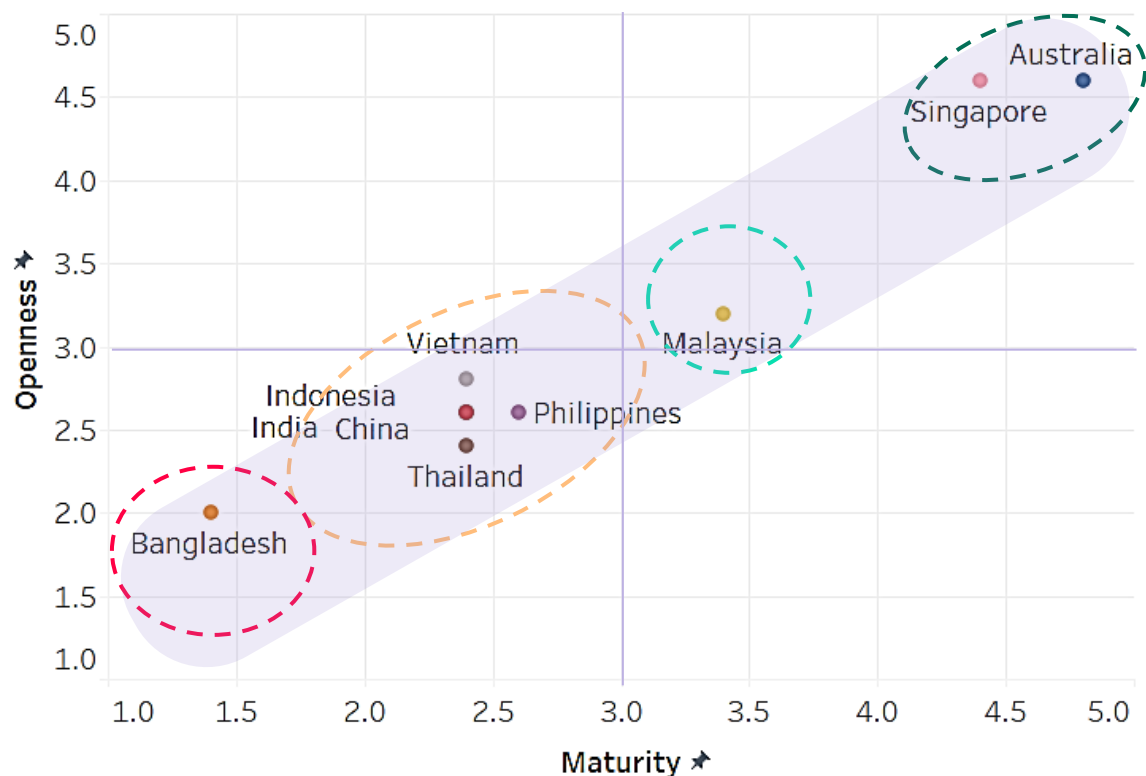
NEW PRINCIPLES IN SMART REGULATION

	Social governance, trust and shared responsibility	Enabling the third party, business, NGO, or consumers to help contribute towards setting up the regulation and compliance through self regulation/voluntarism.
	Relevant and forward thinking	Better recognize future innovation and risks, allowing regulators to be adaptive, flexible and agile about regulations to spur innovation
	Technology enabled	Implementation of technology especially digitalization and data-driven analytics, to improve the effectiveness/efficiency of regulation.

SMART REGULATION – OUTCOMES OF RESEARCH


MAPPING OUT COUNTRY READINESS TO SMART REGULATION

Key countries maturity and openness for SR




 **Australia and Singapore**


- Both are very mature countries in term of smart regulation principles and very open for collaboration/changes

 **Malaysia**

- Relatively mature and open country for SR, but still below Australia, Singapore

 **Vietnam, Philippines, Thailand, China, Indonesia, India**

- Moderate in term of maturity and open for SR

 **Bangladesh**

- Low in maturity and openness

Need a country-specific approach!

SMART REGULATION – NEXT STEPS

Prioritization of Countries

Top priority target: ASEAN countries that are not yet in the SR mindset: Indonesia, Thailand, Vietnam, Philippines.

China and India as biggest market in APAC is also a priority target: China & India can be driven by local Trade Associations in priority with capability support from FIA if/as needed

Singapore and Malaysia: the government are already/start to be in SR mindset and open for collaboration: can be targeted for a quick win on implementation

General direction based on the internal brainstorm with reference on members expectation (not in order of priority)



Research and analysis of country readiness, gap, stakeholders for SR



Facilitate dialogue between government, private, NIA, consumers on SR



Introduce and align on SR with regulators



Develop tools/resources/platform for advocacy & guidance on SR for regulators



Stakeholder partnership for bringing/leveraging SR



Integrate and communicate SR approach on existing FIA priorities/initiatives

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**SINGAPORE:
SODIUM REDUCTION
EFFORTS BY HPB**

UPDATE ON REPORT LAUNCH & ENGAGEMENT

Focus on Salt, Sauces & Processed Foods (starting with Sauces & Seasonings)

- Identify key product sources directed at consumers, e.g. F&B outlets & retail
- HPB open to engage FIA & members on rolling out lower sodium options

Drive awareness among companies & consumers on lower sodium options

- For a start, FIA will host a webinar session(s) with members & non-members to showcase low sodium alternatives and how it can assist in reformulation

Voluntary industry-led sodium reduction pledge

- HPB will release information on plans for a voluntary pledge in Q3/21
- FIA will develop proposal on targets/timelines based on existing models (UK/Aus) for industry commitment on salt reformulation
- FIA could commission an extension of the reformulation study done previously focusing on salt reduction activities (past & present)
- FIA will help identify the gaps and the types of support govt/trade associations can provide
- Once the pledge is introduced, FIA can support with monitoring compliance



THAILAND: HFSS TASKFORCE



Proposed Restrictions on Labelling and Marketing

- Score-based, colour coded labelling scheme
- The amount of energy and nutrients per serving will contribute to a score
- Affected Categories: Snacks, Dairy, Beverages

- Based on the scoring criteria, products classified as Grade C (red) will not be allowed to be marketed to children
- Children will be defined as those aged below 18 years
- Restrictions on Marketing Channels (Traditional, Digital, Schools) and Promotions

Taskforce on HFSS Foods (TH)

- To drive in-country engagement in Thailand, specifically to address proposed restrictions on advertising and the introduction of a new FOP labelling scheme
- Avoid/Delay restrictions by showcasing reformulation efforts, healthier marketing campaigns, voluntary commitments on responsible advertising
- Revisions to the Thai Pledge

Current Developments and Actions

- No significant updates from DOH on the progress of the proposal
- Proposed Restrictions nudged to be passed as an act/law – 3-4 Years to implementation
- FTI, TBA are representing industry in the discussions with DOH as part of a WG
- FTI, TBA working towards enhancing the Thai Pledge
- WFA-FIA to host a workshop on current trends on voluntary marketing pledges in the region and revisions to global marketing commitments
- Carry out a qualitative analysis with consumers and experts to gain insights on the use and effectiveness of existing labels to understand gaps and identify areas for improvements



**CHINA:
LAUNCH OF
HEALTHIER PRODUCT
REFORMULATION REPORT**



Healthier Product Reformulation In China

Research by



STATISTICS

Challenges in China

10.7%

of the adult population are overweight¹



11.9%

of the population suffer from diabetes⁴



6.8%

of children under five years are overweight⁵

10%

of the adult population suffer from hypertension³



89%

believe that the "three reductions" – fat, salt and sugar are important in driving the national health strategy

Consumer and company research on progress and priorities



www.foodindustry.asia

Manufacturer Views



Top Three Priorities

- 1 Reducing salts
- 2 Reducing fats
- 3 Reducing sugars



Top Three Motivators

- 1 Meeting consumer needs
- 2 Improving public health
- 3 Build/protect brand reputation



Top Three Challenges

- 1 Maintaining taste
- 2 Consumer acceptance
- 3 Lack of suitable substitutes



97%

would be encouraged to expand its healthier product portfolio if there were more government incentives



89%

have been working on reformulation



89%

of the respondents improved their processing techniques to support reformulation

HEADLINE STATISTICS

92% are trying to improve their diets

About 94% of consumers claimed to look at nutrition information on packs at least some of the time and nearly 69% claimed to look at the labels regularly.

51% check for the amount of fat in products

About seven in ten consumers feel that the food and beverage sector has already been delivering on healthier products.

89% have been working on reformulation

Industry's Top Priorities: Reducing Salts, Fats, Sugars

Industry's Top Three Motivators: Meeting Consumer Needs, Improving Public Health, Building/Protecting Brand Reputation

Industry's Top Three Challenges: Maintaining Taste, Consumer Acceptance, Lack of Suitable Substitutes

97% would be encouraged to expand its healthier product range with government incentives

KEY CONCLUSIONS

Consumers recognise the importance of reducing the consumption of fat, salt and sugar in the diets. However, the awareness has not sufficiently translated to practice.

Majority claimed to look at nutrition information on food product, with more than two-thirds looking at nutrition labels regularly.

The lack of knowledge among consumers on the presence of “invisible salt” in food presents an opportunity for education campaigns focused on hidden salt in food.

Product familiarity, absence of additives, taste, nutrition information and the introduction of new, healthy products feature in the top four drivers of product choice.

Poor market response to reformulated products is a key factor for food companies to employ a gradual approach to reduce fat, salt, sugar content in its products.

Most companies noted that increased policy support from the government through fiscal incentives would nudge companies to carry out more R&D associated with reformulation.

KEY RECOMMENDATIONS

Individual Responsibility

- Increase awareness and knowledge of nutrition concepts
- Understand the importance of preparing home-cooked meals

Accelerating R&D Efforts

- Collaborate with health and nutrition experts to enhance industry development through resource-sharing, technology innovation and new product development
- Improve communications on the availability of healthier products in the market

Strengthen Policy and Regulatory Support

- Engage with consumers using new media platforms to facilitate health communications
- Incentivise industry to develop healthier alternatives with fiscal support and co-developed reformulation guidelines that will help accelerate industry efforts



**REGIONAL:
REFORMULATION
ENGAGEMENT PLAN**



REFORMULATION ENGAGEMENT PLAN

REITERATION

Engaging key stakeholders with the reformulation findings from key markets

- Showcase industry progress, Consumer acceptance
- Identify challenges and opportunities in product reformulation

DISCUSSION

Gaining industry alignment on taking a nimble approach with the changing policy landscape

- Identifying alternative positions on labelling schemes
- Flexibility on increase target age for M2K; Expand scope of marketing channels covered
- Industry views on fiscal disincentives

OUTCOME

Counter-proposals to proposed restrictions

- Set quantifiable goals that enable reformulation over a timeframe
- Nutrient thresholds (energy, fat, sugar, salt/sodium) for various product categories and timeline to achieve thresholds



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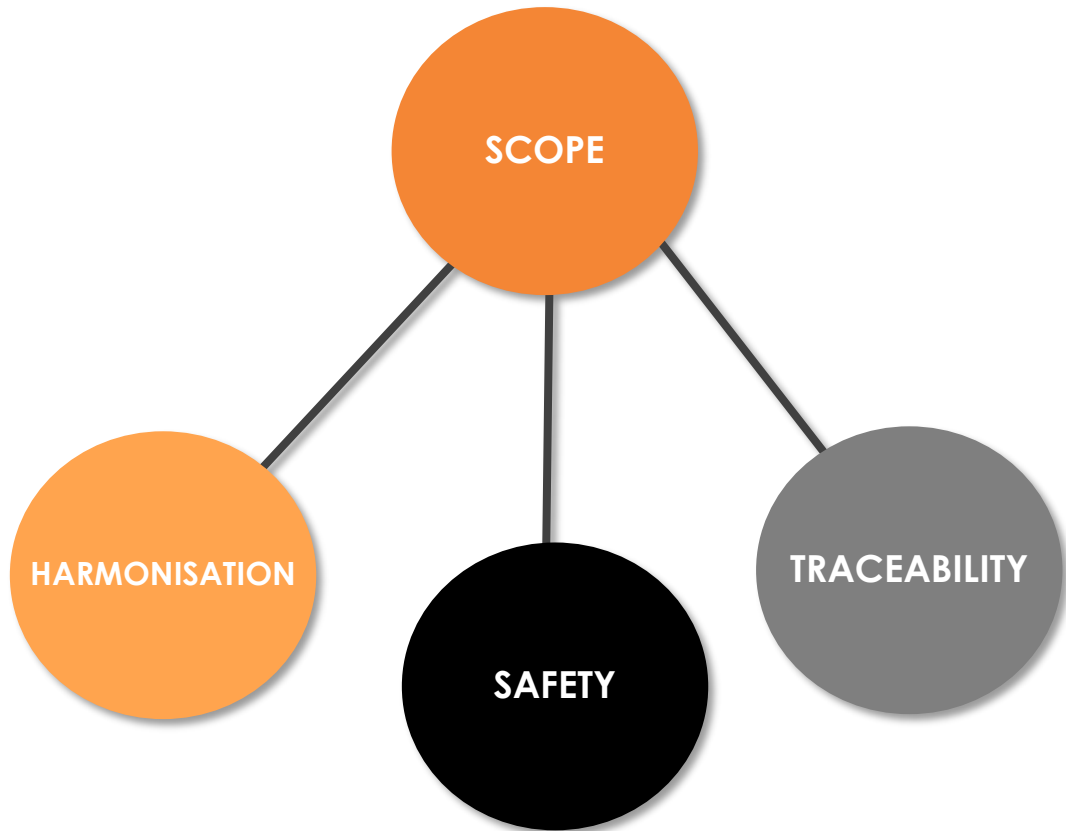
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**FOOD CONTACT
MATERIALS:
STRATEGY & PLAN**



FOCUS ON DRIVING THE USE OF RECYCLED FCM



HARMONISATION

Develop harmonised definitions and approaches to recycled food packaging materials across Asian countries

SAFETY

Develop standardised analytical methods as well as guidelines, e.g. to verify the lack of migration of legally added & non-intentionally added substances (NIAS)

TRACEABILITY

Propose a verification & certification scheme in order to document recycled food packaging materials and ensure traceability

- FIA with industry developed **model process & material standards for recycled PET**
- A **Industry-KOL session** will be held on 2 Jun to peer-review the standards and get updates regulatory progress in CN & TH
- An **Industry-Regulator session** is planned for Aug to advocate with regulators for the adoption of the model standards
- FIA will also look at international platforms to advocate for the model standards, e.g. Sust Pack Asia, Annual China FCM Conference, etc.
- Model standards & engagements to drive progress by 2021 on regulatory approvals towards recycled FCM

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OXFORD ECONOMICS REPORT



UPDATE ON REPORT LAUNCH & ENGAGEMENT

- Comprehensive report was launched in SG on 23 Mar with FIA members

Country-specific report launches

Philippines
(with PCFMI)

15 April

Vietnam
(with AmCham Vietnam)

23 April

Thailand
(with FTI)

20 May

Philippines
(with GAPMMI)

25 May



Each country report launch supported with press release issued (English & local language) on day of session and followed up with an opinion editorial



FIA plans to work with NIAs in 2H/21 to engage media to amplify key findings from the report



Secretariat developing a page on the FIA website containing materials including:

- Country Reports in PDF
- Press releases
- News coverage
- Communications toolkit

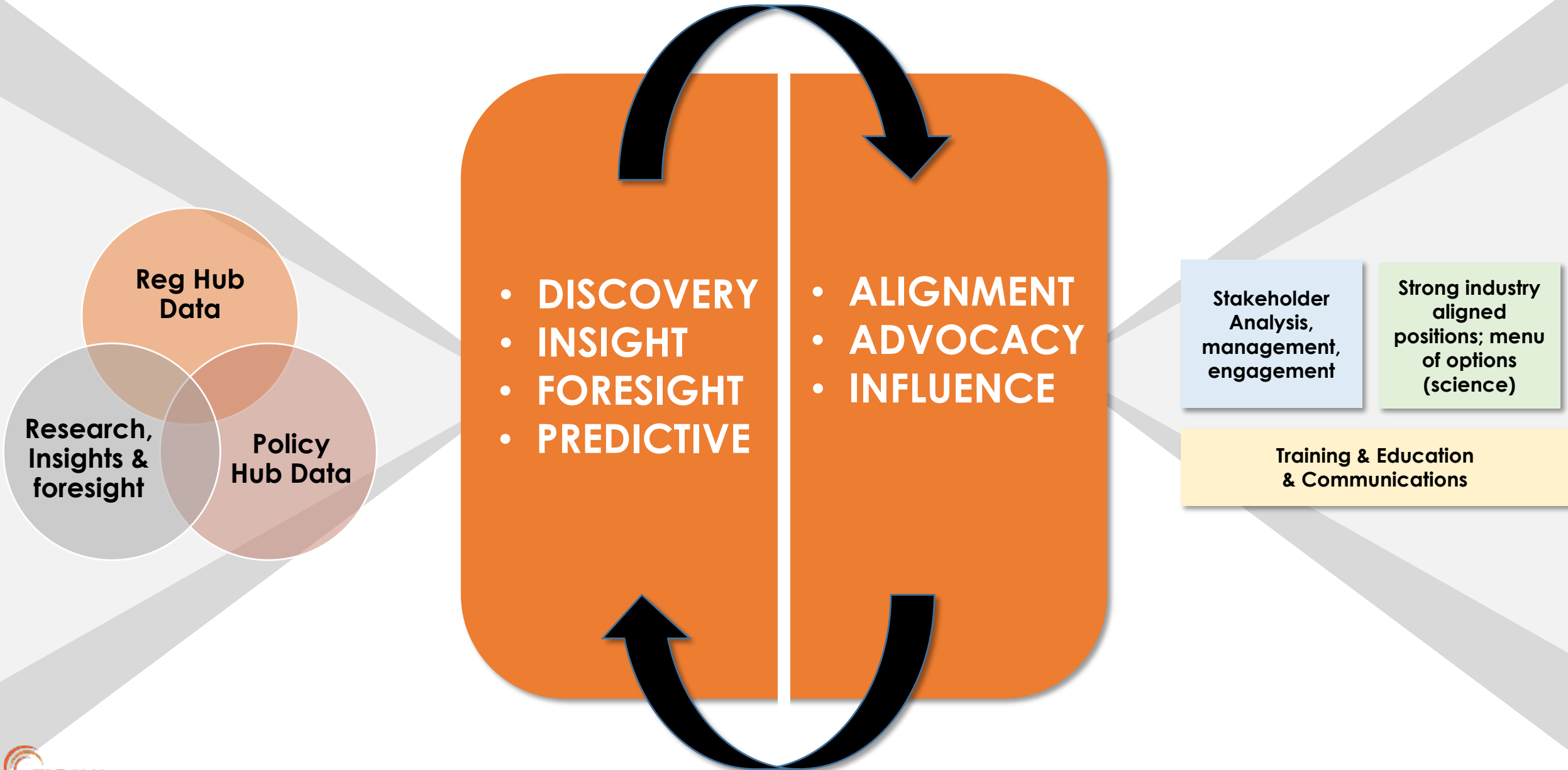


Communications toolkit will help industry to respond to govt plan to impose fiscal measures

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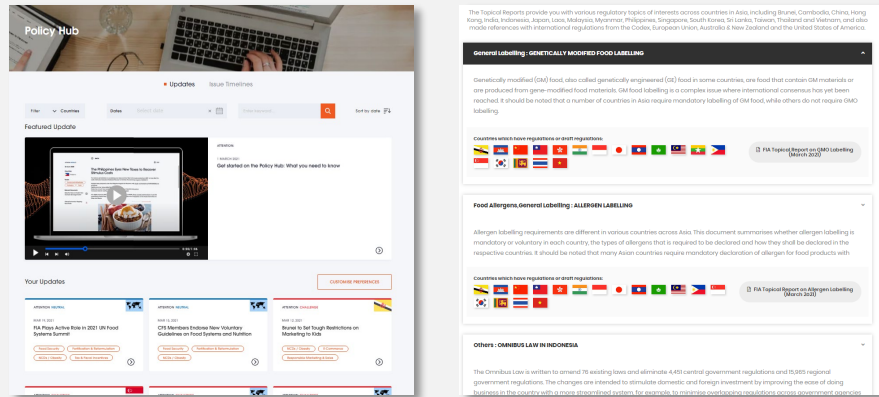
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FIA FOCUS: SOCIAL LICENSE TO OPERATE BUDGET



FUTURE BUSINESS INTELLIGENCE: BUILDING ANALYSIS, INSIGHT, FORESIGHT CAPABILITIES FOR THE CLUSTERS, MEMBERS, NIAs

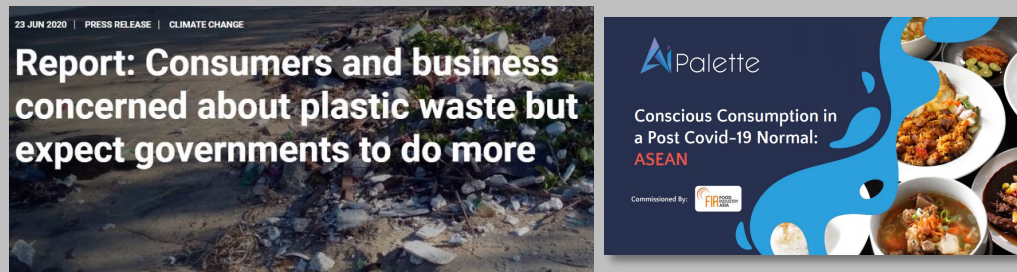
REGULATORY & POLICY HUBS: 100% INTERNAL



ISSUES BASED RESEARCH: 50:50 INT/EXT



CONSUMER RESEARCH RELATED TO OUR ISSUES: SQUADS AND CLUSTERS



POLICY EVALUATION & REGULATORY RESEARCH



FUTURE BUSINESS INTELLIGENCE: BUILDING ANALYSIS, INSIGHT, FORESIGHT CAPABILITIES FOR THE CLUSTERS, MEMBERS, NIAs

WHAT NEXT?

- **Member quantitative/qualitative: PA, SRA, R&D/innovation, Senior execs (Council)**
- **Develop a business plan for research arm of FIA**



THANK YOU