

FOODSWITCH: STATE OF THE FOOD SUPPLY

AUSTRALIA | 2022



The George Institute
for Global Health



FOODSWITCH

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The George Institute for Global Health acknowledges the Gadigal People of the Eora Nation as the Traditional Custodians of the land on which our Australian office is built and this report is written. We pay our respect to Elders past, present and emerging.

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INTRODUCTION

Unhealthy diets are a leading contributor to poor health globally¹ and in Australia, fewer than one in ten people consume a diet in line with the Australian Dietary Guidelines.² The *FoodSwitch: State of the Food Supply Report* has been assessing the healthiness of Australia's packaged food supply since 2018. It shows the healthiness of product portfolios across large food and beverage manufacturers and aims to acknowledge those who are performing well and encourage positive change from those who are not.

This year's report explores changes in healthiness of Australia's top 20 food and beverage manufacturers between 2021 and 2022 using (1) the Health Star Rating (HSR) nutrient profiling system,³ (2) the Australian Dietary Guidelines' classification of 'Core' and 'Discretionary' foods, and (3) the NOVA classification⁴ of ultra-processed foods.

Additionally, this year's report reviews how well the top 20 food and beverage manufacturers have performed against nutrient reformulation targets agreed between the food industry and the Australian Government as part of its Healthy Food Partnership (HFP)⁵ program. The HFP program is designed to encourage Australians to eat healthier diets in line with the Australian Dietary Guidelines; improve the health of Australians; reduce overweight and obesity; reduce diet-related diseases, and lower the cost of health care to the economy.⁶

The HFP reformulation targets were designed to help encourage and support food manufacturers in cutting the amount of sodium (salt), sugar and saturated fat added to the foods and drinks that they sell. In May 2020, the HFP released targets for sodium and saturated fat, and in July 2021 targets for sugar and additional targets for sodium were released.⁷

Finally, each year, the *FoodSwitch: State of the Food Supply Report* contains a separate Spotlight that focuses on a topical aspect of the food supply. This year, the Spotlight focuses on added sugars – examining the presence of added sugars in the food supply and levels across food categories. The Spotlight also provides examples of simple product switches that can help cut intakes of added sugars.

APPROACH

This report uses data collected as part of The George Institute's FoodSwitch program from comprehensive in-store surveys conducted at Australia's major grocery retailers: ALDI, Coles, Independent Grocers of Australia (IGA) and Woolworths. The labels of all packaged foods and beverages available in-store on the days of survey were imaged and processed using the FoodSwitch Data Collection system. Products with no nutrition information panel were excluded and duplicates of identical products in different package sizes were removed.

The top 20 manufacturers and retailers were included based on a 2021 retail sales value share⁸ and were reviewed using several metrics to assess the overall healthiness of their product portfolios.

TOP 20 MANUFACTURERS: PRODUCT HEALTHINESS

Manufacturer *	Nutrient profiling summary score		Dietary guidelines	Extent of processing	Uptake
	Average HSR	Proportion HSR \geq 3.5 (%)	Proportion discretionary (%)	Proportion ultra-processed (%)	Uptake of HSR (%)
Simplot	3.9	88.6	27.6	41.9	92.7
McCain Foods	3.6	77.6	30.8	87.9	92.5
Lactalis	3.4	65.0	19.0	63.2	1.2
Woolworths (own brand)	3.2	61.0	37.5	59.0	90.3
IGA (own brand)	3.0	51.6	32.9	44.4	0.0
Coles (own brand)	3.0	53.6	42.8	65.4	88.8
Heinz	3.0	57.5	27.6	81.6	26.2
Bega Cheese	2.9	44.6	27.2	64.5	54.7
George Weston Foods	2.7	50.8	47.5	61.7	50.0
ALDI (own brand)	2.7	43.7	51.6	66.0	68.5
The Smith's Snackfood Company	2.6	23.4	82.2	89.7	96.3
Goodman Fielder	2.6	38.5	49.5	84.5	30.0
Coca-Cola Amatil	2.5	47.5	92.5	96.7	76.7
Schweppes	2.4	42.7	88.1	97.9	86.7
Unilever	2.3	33.2	55.1	88.7	59.1
Mars	2.1	22.9	84.7	95.8	84.4
Nestlé	2.1	29.4	71.9	95.6	73.0
Arnott's Biscuits	1.5	5.0	91.2	100.0	79.9
Peters Ice Cream	1.3	0.0	100.0	100.0	0.0
Mondelez	1.0	3.3	90.8	93.2	2.7

* Manufacturers are ranked according to mean HSR

Green = improvement in average HSR

Yellow = no change in average HSR

Red = decrease in average HSR compared to 2021



MANUFACTURER RANKING: 2021 VS 2022

2021 Manufacturer rank and HSR			2022 Manufacturer rank and HSR		
Simplot	3.9		3.9	Simplot	
McCain Foods	3.7		3.6	McCain Foods	
Lactalis	3.4		3.4	Lactalis	
Woolworths (own brand)	3.2		3.2	Woolworths (own brand)	
IGA (own brand)	3.1		3.0	IGA (own brand)	
Coles (own brand)	3.0		3.0	Coles (own brand)	
Heinz	3.0		3.0	Heinz	
ALDI (own brand)	2.8		2.9	Bega Cheese	
Goodman Fielder	2.7		2.7	George Weston Foods	
The Smith's Snackfood Company	2.7		2.7	ALDI (own brand)	
Unilever	2.5		2.6	The Smith's Snackfood Company	
George Weston Foods	2.5		2.6	Goodman Fielder	
Bega Cheese	2.5		2.5	Coca-Cola Amatil	
Coca-Cola Amatil	2.4		2.4	Schweppes	
Schweppes	2.2		2.3	Unilever	
Mars	2.1		2.1	Mars	
Nestlé	2.1		2.1	Nestlé	
Arnott's Biscuits	1.6		1.5	Arnott's Biscuits	
Peters Ice Cream	1.5		1.3	Peters Ice Cream	
Mondelez	1.1		1.0	Mondelez	

■ Green = increase in ranking
 ■ Yellow = no change in ranking
 ■ Red = decrease in ranking

Simplot had the highest average HSR (3.9) and Mondelez the lowest (1.0). Four manufacturers improved their average HSR and rank – George Weston Foods, Coca-Cola Amatil, Schweppes and Bega Cheese, with Bega Cheese showing the greatest improvement, driven by acquisition of new brands. Nine manufacturers had a decrease in their average HSR compared to 2021 and seven of the top 20 manufacturers maintained the same average HSR. Additionally, for the top 20 manufacturers:

- *Only eight had more than half of their products considered healthy (≥ 3.5 HSR)*
- *10 had more than half of their product portfolios defined as discretionary choices*
- *18 had more than half of their portfolio made up of ultra-processed products, with seven having over 90% of their products considered ultra-processed.*

Woolworths, as in 2021, was the top performing retailer with an average HSR of 3.2 for their own-brand products, followed by IGA (3.0), Coles (3.0), and ALDI (2.7).

HEALTH STAR RATING UPTAKE

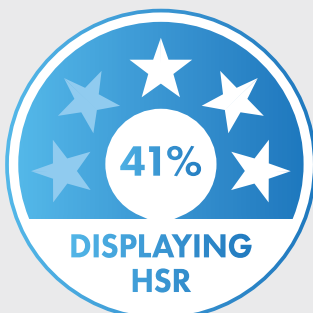
Disappointingly, this year's data shows the continuing limited uptake of the voluntary HSR program since its launch in 2014 – with only 41% of all products displaying an HSR on pack. While the top 20 manufacturers featured in this report have higher rates of uptake (70%), there is high variability across manufacturers, ranging from 0% for Peters Ice Cream to 96.3% for The Smith's Snackfood Company.

Across the four major retailers, Woolworths had the highest proportion of products displaying an HSR on pack (90.3%), followed by Coles (88.8%) and ALDI (68.5%). Of note, none of the IGA own-brand products displayed an HSR.

This lack of consistency in the display of HSR on pack is of concern given research has shown that variation in HSR uptake increases consumer mistrust and creates the perception that manufacturers are using it selectively as an industry funded or 'pay for rating' scheme.⁹

Eight years on from its launch, the continuing low uptake of HSR demonstrates the need to make the scheme mandatory if it is to be effective in achieving its goal of helping Australian consumers make healthier choices.

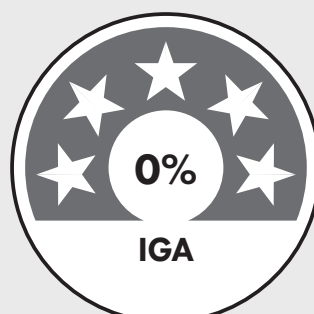
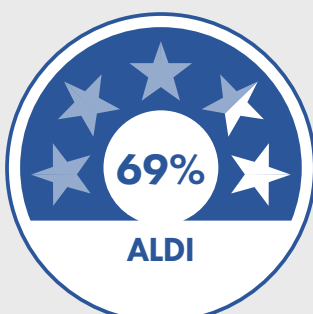
% HSR ON PACK



Australian food and beverage manufacturers in 2022 displaying an HSR



The top 20 Australian food and beverage manufacturers in 2022 displaying an HSR



IGA have chosen not to participate in the Government's Health Star Rating program to date.



HEALTHY FOOD PARTNERSHIP REVIEW

The nutrient content of products from the top 20 manufacturers – including retailers’ own brands – have been assessed against the HFP’s reformulation targets. These targets cover a range of food categories – 32 categories for sodium, nine categories for sugar and five categories for saturated fat. This current analysis uses data from November 2019 as a baseline (which was just ahead of the publication of the HFP targets in May 2020) and compares this with data from 2022 in order to assess changes in the number and proportion of products meeting these reformulation targets over time.

PERFORMANCE BY CATEGORY

- *Only 8 out of the 32 categories with sodium targets had an increase in the proportion of products meeting the targets.*
- *There was no improvement across any of the saturated fat categories, in fact one category worsened and had a lower proportion of products meeting the targets.*
- *There were no significant changes in any of the categories with sugar targets.*

It is evident from the analysis that only very minor improvements have been achieved since the inception of the sodium targets in 2020. Disappointingly, no improvements for sugar or saturated fat have been achieved to date. Given a large proportion of products already met the targets prior to implementation raises concerns about the potential impact of these targets for improving population dietary intakes. Moreover, a limited number of food categories are targeted under this scheme, which further reduces the scope for impact. As such, there is an opportunity for the HFP to set more stringent targets across a larger set of categories. Such efforts would likely improve the capacity of the HFP reformulation program to have a meaningful impact on the nation’s health, particularly if additional food category targets were implemented alongside strong Government leadership to further encourage the food industry to make progress towards meeting these targets.

PERFORMANCE BY MANUFACTURER

Manufacturer	Proportion of products meeting all targets (%)	
	2019	2022
Unilever	90.3	98.5
Mars	76.1	78.6
Woolworths (own brand)	59.2	68.8
Coles (own brand)	48.5	68.8
Simplot	51.4	66.3
Coca-Cola Amatil	42.4	64.9
Nestlé	62.5	64.6
Bega Cheese	60.0	63.8
Schweppes	52.0	61.0
George Weston Foods	37.4	60.8
The Smith's Snackfood Company	66.7	60.0
Mondelez	59.4	59.0
IGA (own brand)	46.2	54.4
Arnott's Biscuits	60.0	53.1
Goodman Fielder	27.5	52.1
Lactalis	61.0	51.7
ALDI (own brand)	49.2	50.2
Heinz	20.7	37.4
McCain Foods	33.8	28.1
Peters Ice Cream	NA	NA

■ Increase in proportion of products meeting all targets

■ Reduction in proportion of products meeting all targets

Across the top 20 manufacturers, a total of 14 had an increase in the proportion of targeted products meeting the HFP reformulation targets over time.

All four supermarket retailers had an increase in the proportion of products meeting targets, with both Coles and Woolworths reaching a level of 68.8% followed by IGA (54.5%) and then ALDI (50.2%).



2022 SPOTLIGHT: ADDED SUGARS

The aim of the 2022 Spotlight analysis is to highlight the amount of added sugars present in the Australian food supply and the amount hidden in everyday foods. We also provide examples for how consumers can use the FoodSwitch app to make healthier choices when shopping.

BACKGROUND

Foods and drinks can contain two types of sugar. These include intrinsic sugars that occur naturally in many foods and drinks including intact fruits and vegetables and milk. They also include sugars from other ingredients – these are considered added sugars and are often added to products by manufacturers or consumers, usually to enhance sweetness. Consuming too many foods high in added sugars can lead to a range of poor health outcomes including weight gain, diet-related diseases including type 2 diabetes and heart disease, and dental caries.

Some Australians consume up to 22 teaspoons of added sugars each day. This is nearly double the 12 teaspoon limit recommended by the World Health Organization (WHO).¹⁰

Currently, food and beverage manufacturers in Australia are only required to provide the amount of total sugars on the product's nutrition information panel. Despite the Australian Dietary Guidelines recommending Australians reduce their intake of added sugars,¹¹ the amount of added sugars in a product is not currently displayed and ingredients defined as added sugars are not always obvious when reading ingredient lists. This makes it impossible for consumers to identify and avoid these added sugars.

There is currently no regulatory definition of added sugars in the Australia and New Zealand Food Standards Code (FSANZ). However, this definition is currently being defined by FSANZ through a consultation into the labelling of added sugars. The purpose of the consultation is to support a review of labelling options for the inclusion of added sugars on packaged foods which includes developing the definition of added sugars that will set out the requirements of how added sugars will be identified and quantified on the nutrition information panel.

Some Australians consume up to

22 teaspoons
of added
sugars a day



or nearly **2x**
the WHO limit.¹⁰

As part of this consultation, The George Institute for Global Health has proposed a definition for added sugars based on a recent evidence review. This definition includes all food components covered by the 'free' sugars definition proposed by WHO as well as all other sugars that are found to be associated with poor health outcomes and should be limited in the diet.¹²

In the absence of mandatory labelling and an agreed definition, The George Institute has also developed a 10-step method for estimating the added sugars in packaged foods using ingredient and nutrient information available on pack. This method has been applied to all Australian packaged foods and beverages within the FoodSwitch database. The method builds on a published research study that estimates added sugars using analytical data and ingredients in foods.¹³

APPROACH

This Spotlight uses the 2022 FoodSwitch Monitoring Dataset to explore the presence of added sugars in Australian packaged foods and beverages. We estimated the added sugars for products from the top 20 manufacturers using the 10-step method referenced above.

The Spotlight also looks at the many ways in which added sugars are listed on food labels followed by some examples of how switching between products within the same food category can help cut intakes of added sugars.

2022 SPOTLIGHT: ADDED SUGARS

ADDED SUGARS IN THE AUSTRALIAN FOOD SUPPLY

2 out of **3** 
packaged foods
contain added sugars

Most of the food and beverages available on supermarket shelves contain added sugars. Manufacturers should be made accountable for the levels of added sugars in the foods they produce and should aim to reduce added sugars in their product ranges.

Over **2/3** 
of total sugars in own-brand
products are added sugars

Mandatory labelling of added sugars on the nutrition information panel would allow consumers to identify the amount of added sugars in food and make informed choices when shopping. Mandatory labelling may also stimulate reformulation to create a healthier food supply and reduce the number of products available for sale that are high in added sugars.

ADDED SUGAR INGREDIENTS

Added sugars can be disguised under many different names so it can be hard for a consumer to identify these in an ingredient list.

Analysis of the FoodSwitch database shows that sugars are listed in over 400 different ways on packaged food labels. This means that while food manufacturers sometimes use common terms for added sugars like sugar, glucose and dextrose, they also report added sugars under many other terms, some of which consumers may not recognise. Less common terms for added sugars used in Australian foods and beverages are outlined below.

This supports a need for clear and consistent ingredient labelling of added sugars. A labelling review in 2011 recommended that ingredients defined as added sugars be grouped together under the term 'added sugars' followed by a bracketed ingredients list of added sugars.¹⁴ This would enable consumers to more easily identify added sugars and help them reduce their intake of added sugars in line with the Australian dietary guidelines and WHO recommendations.

fructose syrup raw sugar
 rice malt syrup invert sugar syrup
 maltodextrin agave syrup honey
 organic sugar corn syrup coconut sugar
 golden syrup molasses coconut nectar
 glucose syrup
 fruit juice concentrate dextrose
 maple syrup tapioca syrup fruit paste
 brown rice syrup

2022 SPOTLIGHT: ADDED SUGARS

SWITCH TO LOWER ADDED SUGAR ALTERNATIVES

Our analysis found that two thirds of Australian packaged food and beverage products contain added sugars. Even though a high proportion came from obvious categories such as confectionery and sugar-sweetened soft drinks, added sugars were also found in everyday foods such as yoghurts, breakfast cereals, and sauces.

To help consumers make informed decisions when it comes to reducing added sugars in their diet, we've estimated the added sugars hiding in some everyday items. We've analysed some popular categories and estimated how much added sugar could be saved by switching products.*

MAKE THE SWITCH

Flavoured dairy milk

Switch from *Norco Real Iced Chocolate Milk* to *Dairy Farmers No added Sugar Classic Chocolate Flavour Milk* to save around 7tsp of added sugar per 500ml bottle.

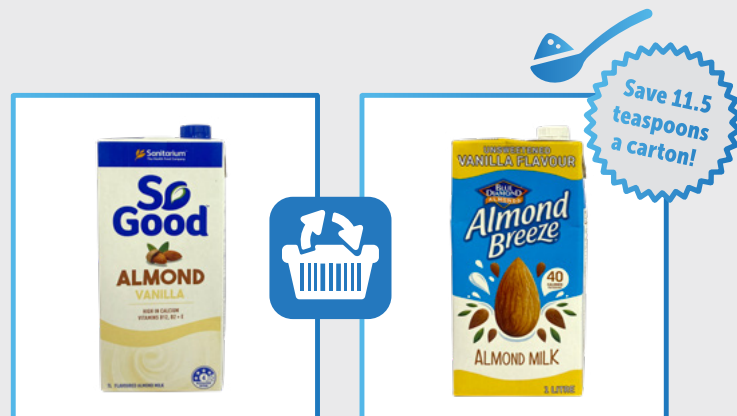
Consuming two bottles per week, this switch could save you around 3kg of added sugar a year.



Flavoured almond milk

Switch from *Sanitarium So Good Almond Vanilla Flavoured Milk* to *Blue Diamond Almond Breeze Unsweetened Vanilla Flavoured Milk* to save around 11.5tsp of added sugar per 1L carton.

Consuming a carton per week, this switch could save you around 2.5kg of added sugar a year.



BBQ sauce

Switch from *Masterfoods BBQ Sauce* to *Fountain Reduced Sugar BBQ Sauce* to save around 50.5tsp of added sugar per 500ml bottle.

Consuming a bottle per month, this switch could save you around 2.5kg of added sugar a year.



*1 teaspoon of sugar = 4.2g

2022 SPOTLIGHT: ADDED SUGARS

Greek yoghurt

Switch from *Jalna Pot Set Original Sweet & Creamy Greek Yoghurt* to *Chobani Plain Greek Yoghurt* to save around 20.5tsp of added sugar per 2kg tub.

Consuming a tub per week, this switch could save you around 4.5kg of added sugar a year.



Peanut butter

Switch from *Bramwells American Style Peanut Butter Smooth* to *Sanitarium No Added Sugar or Salt Peanut Butter* to save around 7tsp of added sugar per 500g jar.

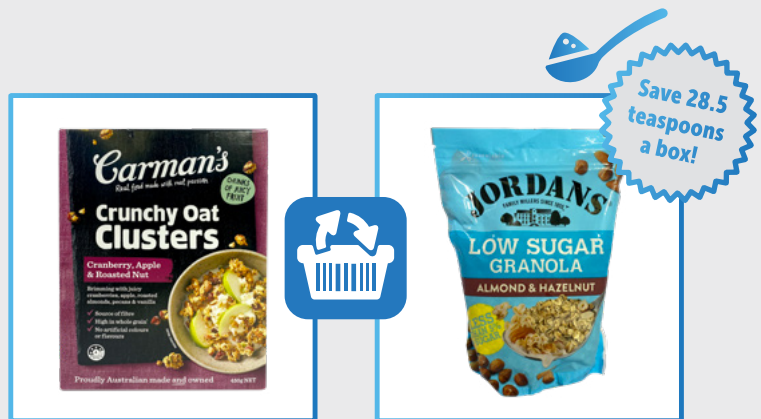
Consuming a jar per month, this switch could save you around 400g of added sugar a year.



Granola

Switch from *Carman's Crunchy Oat Clusters Cranberry, Apple & Roasted Nut* to *Jordans Low Sugar Granola Almond & Hazelnut* to save around 28.5tsp of added sugar per 500g box.

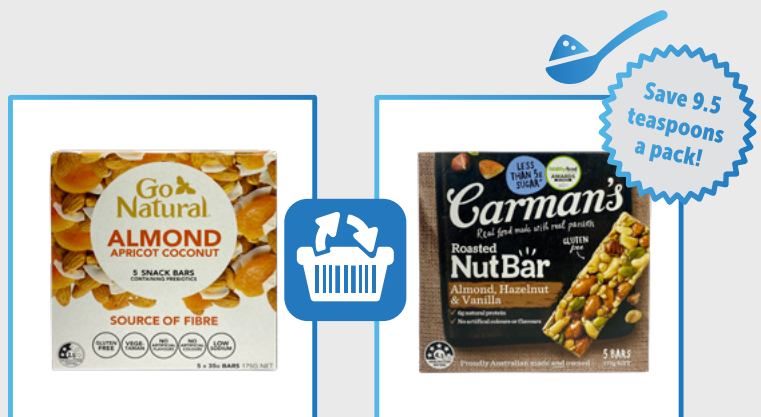
Consuming a box per fortnight, this switch could save you around 3kg of added sugar a year.



Cereal bars

Switch from *Go Natural Snack Bars Almond, Apricot & Coconut* to *Carman's Roasted Nut Bar Almond, Hazelnut & Vanilla* to save around 9.5tsp of added sugar per 175g pack.

Consuming a pack per week, this switch could save you around 2kg of added sugar a year.



2022 SPOTLIGHT: ADDED SUGARS



Currently, the only way for consumers to identify these switches and make efforts to reduce their intake of added sugars is through the FoodSwitch app. FoodSwitch has developed an AddedSugarSwitch feature which allows shoppers to scan the barcode of any product with their mobile phone and see an estimate of added sugars, as well as healthier alternatives with lower added sugars to switch to.

Each item in AddedSugarSwitch shows an estimate of its added sugars expressed in grams per 100g and the number of teaspoons this equates to.





RECOMMENDATIONS

From this year's analysis of the state of the food supply it can be seen that the introduction of a voluntary food policy initiative results in little and slow uptake from industry. This suggests that future policy interventions that aim to achieve a healthier food supply and improve population health should be mandatory. The Australian food and beverage industry should be made accountable for the healthiness of the foods they manufacture, and efforts should be put in place to make it easier for customers to identify healthier options.

There are multiple ways that this could be achieved:

- *More transparent nutrition labelling and greater regulation regarding use of claims*
- *Retailers should set internal nutrition standards to improve the healthiness of products that they sell*
- *Government should set more stringent reformulation targets and further category-specific targets*
- *Manufacturers should aim to meet the current reformulation targets across relevant products*
- *Manufacturers should work towards displaying the HSR across their entire product range*

Rapid and substantive gains will be achieved only with stronger Government leadership. If voluntary efforts fail, the Government should make the HSR and HFP reformulation targets mandatory in order to provide an incentive for the food industry to participate. Such efforts are vital for the health of the Australian population – any actions that improve the quality of the Australian food supply have the potential to reduce overweight, obesity and premature death and disability for millions of Australians.

ABOUT FOODSWITCH

Learn more about FoodSwitch [HERE](#)

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DECLARATION OF INTEREST

The George Institute for Global Health is a not-for-profit health and medical research institute, with a mission to improve the health of millions of people worldwide by focusing on the world's biggest killers. The Institute works with industry, Government and community partners where it can advance this mission and engagement does not conflict with our ability to further our public good research goals. The George Institute has had multiple interactions with Australian industry, Government and consumers in regard to the quality of Australian foods. This report was prepared independent of interested organisations and provides an objective evaluation of the state of the Australian food supply.

ABOUT THE GEORGE INSTITUTE FOR GLOBAL HEALTH

The George Institute for Global Health is an independent global medical research institute, with major centres in Sydney, China, India and the UK. The George Institute is focussed on reducing the burden of the leading causes of death and disability around the world – chronic disease and injury. Our research has driven major improvements in the prevention and treatment of heart disease, stroke, diabetes, kidney disease, and many other conditions, and our researchers have been recognised among the world's best for scientific impact and excellence. Affiliated with world class universities such as UNSW Sydney, we have over 1,100 staff globally, a global network of collaborators, projects in more than 50 countries, and have raised over \$1 billion for global health research.

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To find out more about our FoodSwitch food data,
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Questions

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