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## **Partnership for a healthier diet**

Annual report 2020

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# Preface

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Fafo has been commissioned by the Directorate of Health to evaluate the Letter of Intent for facilitating a healthier diet. The agreement is entered into between the health authorities and the food industry. The evaluation includes an annual self-report from the parties who have signed the agreement, this memorandum is the third consecutive one. Additionally, a mid-term evaluation has been carried out and a final evaluation is planned.

We thank the co-ordination group of the letter of intent for the valuable input in the process.

Oslo, 20th October 2021

Anne Hatløy, Ketil Bråthen, Svein Erik Stave and Anne Inga Hilsen

# 1 Self-reporting 2020

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*The letter of intent on facilitating a healthier diet* was signed by the Ministry of Health and Care Services in December 2016 and is valid until December 2021. A new and revised agreement comes into force on 1 January 2022 and will continue until 31 December 2025. The aim of the agreement is to reduce the population's intake of salt, added sugar and saturated fat and increase the intake of fruit, berries, vegetables, whole grains, fish, and seafood. This will be achieved through a collaboration between the food industry and the health authorities. The agreement will make it easier for consumers to make healthier choices through a comprehensive and overall collaboration between the food industry and the health authorities.

The relationship between the letter of intent and the initiatives and adjustments that the various parties implement to meet it is assessed by Fafo through a follow-up evaluation. The agreement and the experiences from the work are evaluated with special emphasis on the following three questions:

- 1 What measures are taken by the various participants in relation to the agreement?
- 2 How effective do the participants think the letter of intent is as a way to work?
- 3 Do the participants perceive the letter of intent as a good tool to promote a healthy diet?

This is the fourth of five planned reports in Fafo's follow-up evaluation of this agreement. The first two reports have been annual self-reports by the partners on measures implemented in 2017 and 2018, as well as an assessment of the agreement; the third was a mid-term evaluation which in addition to covering the same thematic areas as the two previous years, also looked at the letter of intent as a tool.<sup>1</sup>

It is worth noting some special circumstances that have affected the letter of intent in 2020. One factor that has had a direct impact is that an agreement has been reached between the authorities and the food industry to resume work within Priority area 2, *reduced sugar*, after that work has been on hold from June 2018 to December 2020. In addition, the pandemic that shut down Norway from March 2020 has had both direct and indirect effects on the letter of intent. Some of these factors will be discussed during the presentation of the results of the self-report, but it is worth noting that this is not an evaluation of how the pandemic has affected the letter of intent.

## 1.1 Organisation of the letter of intent

As described in the previous years' reports, the letter of intent is organized under the Ministry of Health and Care Services' (HOD) *business group*, which is chaired by the Minister of Health and Care Services. In the period January 2018 to January 2020, it was the Minister for the Elderly and Public Health who led this work, as during this period there were two ministers in the Ministry of Health, while both before and after it was

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<sup>1</sup> Partnership for a healthier diet. Annual Report 2017. Fafo-paper 2019:12  
Partnership for a healthier diet. Annual Report 2018. Fafo Paper 2019:29.  
Partnership for a healthier diet, mid-term report 2019. Fafopaper 2020:16.

Minister of Health and Care Services Bent Høie who led the work. The overall responsibility for coordinating the work on the letter of intent lies with *the coordination group*. This group consists of representatives of the participants:

- Virke (the Enterprise Federation of Norway)/NorgesGruppen - 2 representatives
- NHO Service og Handel (Norwegian Federation of Service Industries and Retail Trade)/Rema - 2 representatives
- Coop - 2 representatives
- Sjømat Norge (Norwegian Seafood Federation) - 1 representative
- Norges Frukt- og Grønnsaksgrossisters Forbund (Norwegian Fruit and Vegetable Wholesalers' Association) - 1 representative
- NHO Mat og Drikke (FoodDrinkNorway)/food and beverage manufacturers - 4 representatives
- NHO reiseliv (The Norwegian Hospitality Association) - 1 representative
- Virke KBS (kiosk, petrol, and service trade industry) - 1 representative
- Ministry of Health and Care Services - 2 representatives

The Directorate of Health is the secretariat for the letter of intent. The head of the secretariat meets with the coordination group.

## 1.2 Methodology

In all the annual reports, the same method is used for self-reporting. An electronic questionnaire was sent out to all the 96<sup>2</sup>agreement partners who were registered in the Norwegian Directorate of Health's overview.

The questionnaire consists of two parts, one that deals with measures within each individual priority area, and one that is a more general assessment of the agreement (see Appendix 1). The questionnaire has been prepared by Fafo and has been presented and approved by the coordination group for the letter of intent.

### Response rate

For the first two self-reports, around 60 percent responded to the self-reports (see Table 1). In relation to the mid-term evaluation and self-reporting for 2019, extra efforts were made to increase the number of responses. Those who did not respond received many reminders both via e-mail and text and were also called. This increased the response rate to about 80 percent. The results from the 2019 reports did not differ significantly from the two previous years' reports. The coordination group therefore agreed that not so many extra resources should be invested in following up with those who did not respond for 2020.

*Priority area 2: The reduction of added sugar in food and reduction of the population's intake of added sugar* was on hold from July 2018 to December 2020 as a result of the tax increase on chocolate and confectionery and non-alcoholic beverages in the 2018 state budget. The collaboration on reducing added sugar was officially resumed in connection with the meeting of Bent Høie's business group on 8 December 2020. As there was close dialogue between the participants in 2020 and throughout the year it

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<sup>2</sup> The Norwegian Directorate of Health's website states that there are 99 participants. With regard to self-reporting, the participants are calculated on the basis of who responds. Some participants responded on behalf of others, *Cernova* also responded for *Mesterbakeren* and *Nærbakst AS* and *Kavli* is responded for *O. Kavli* and *Q-meieriene* – the five participants are therefore only considered as two participants in the self-reporting. In addition, one of the participants that is still on the Norwegian Directorate of Health's list, *Ingebrigtsen Kjøtt AS* has left the agreement.



was agreed to resume work in priority area 2, in this year's report we have also included the responses from those who have only signed Priority area 2 of the agreement. As Table 1 indicated, 70 percent of the participants responded to the 2020 self-report.

Table 1 Participants and response rate

|                                  | Number of participants who have signed the agreement |      |                   |      | Number of self-reports answered |      |      |      | Response rate |      |      |      |
|----------------------------------|--|------|-------------------|------|---------------------------------|------|------|------|---------------|------|------|------|
|                                  | 2017   | 2018 | 2019 <sup>7</sup> | 2020 | 2017                            | 2018 | 2019 | 2020 | 2017          | 2018 | 2019 | 2020 |
| Salt <sup>1</sup>                | 46   | 60   | 56                | 58   | 29                              | 37   | 45   | 40   | 63%           | 62%  | 80%  | 69%  |
| Sugar <sup>2</sup>               |  |      |                   | 46   |                                 |      |      | 31   |               |      |      | 67%  |
| Fat <sup>3</sup>                 | 40   | 50   | 48                | 46   | 21                              | 28   | 29   | 27   | 55%           | 56%  | 60%  | 59%  |
| #MerAv (MoreOf) <sup>4</sup>     | 58   | 72   | 69                | 72   | 33                              | 33   | 53   | 50   | 57%           | 46%  | 77%  | 69%  |
| Total <sup>5</sup>               |  |      |                   | 96   |                                 |      |      | 67   |               |      |      | 70%  |
| Total without sugar <sup>6</sup> | 71   | 84   | 85                |      | 43                              | 49   | 67   |      | 61%           | 58%  | 79%  |      |

<sup>1</sup>Priority area 1: Reduction of salt content in foods and the reduction of salt intake in the population through the Salt partnership.

<sup>2</sup>Priority area 2: Reduction of added sugar in foods and reduction of the population's intake of added sugar. As a result of the tax increase on chocolate and confectionery and non-alcoholic beverages in the 2018 state budget, collaboration on reducing added sugar was suspended from July 2018 to December 2020 and this priority area was not included in the 2017 to 2019 reports.

<sup>3</sup>Priority area 3: Reduction of saturated fat in foods and reduction of the population's intake of saturated fat

<sup>4</sup>Priority area 4: Increase the population's intake of fruit and berries, vegetables, whole grain products and seafood by 20% by 2021

<sup>5</sup>The total deviates from what has been reported in 2017, 2018 and 2019 due to the fact that several of the agreement partners who have signed the agreement have chosen to submit joint responses - in this overview they are counted as one participant - for details see appendix 2

<sup>6</sup>As a result of the tax increase on chocolate and confectionery and non-alcoholic beverages in the 2018 state budget, collaboration on reducing added sugar has been suspended since July 2018. The 9 agreement partners who have only signed the agreement under priority area 2 have therefore been excluded from the total in the period 2017 to 2019.

<sup>7</sup>For 2019 and 2020, it is indicated as only one mailing if a participant has responded on behalf of several - this explains the decline in the number of mailings from 2018 despite the fact that the number of participants has increased.

## Weighting

As for the mid-term evaluation in 2019, we also choose not to weight the figures in the self-report from 2020 and state unweighted figures from all the previous self-reports. In the self-reports from 2017 and 2018, the measure figures have been weighted, while the attitude questions have always been reported unweighted. It is worth noting that there are few respondents in the sample. Responses from a single participant are given great weight and the confidence levels for the individual responses are great (these figures are not included in the report).

## Reporting form

In the self-report, the participants are asked to report which measures they have implemented in the previous year (see questionnaire appendix 1). These are the same measures that they have been asked about in each report. For each priority area of they have signed, they are asked to report on:

- **Development of new product(s)** – completely new products that the participant has developed or used in the past year to achieve the objective of the letter of intent.
- **Optimisation of existing product(s)** – change of existing products that the participant has implemented in the past year to achieve the objectives of the letter of intent, e.g. reduce the salt and/or fat content of an existing product or increase the proportion of wholemeal flour;
- **Changed packaging or portion size (with the intention of influencing healthier choices)** – facilitate a greater consumption of foods that meet the objectives of the letter of intent through targeted packaging sizes, such as fruits and vegetables in small packages;
- **Change of packaging design (with the intention of influencing healthier choices)** – design of the packaging that makes healthier choices more attractive;
- **Marketing measures** – various marketing measures with a view to achieving the objectives of the letter of intent;
- **Changed product placement with the intention of influencing healthier choices** – this applies especially to outlets and eateries where the placement of fruits and vegetables early in the buffet has been shown to influence customer choice;
- **Changed catering offer** – this option was added for self-reporting from 2018, after participants from the catering industry had also signed the agreement;
- and finally an open question about other actions and the opportunity to clarify this.

For each individual priority area, the participants are asked to assess which measure was most effective and justify why it was effective. All participants are then asked to evaluate the agreement and justify what they gain the most from and what they think is particularly demanding. They are also asked to assess the health authorities' efforts in relation to the letter of intent. Within each category of questions, open-ended questions are also asked about what has been most effective and an overall assessment of the agreement (see attached questionnaire).

## 2 The participants' measures

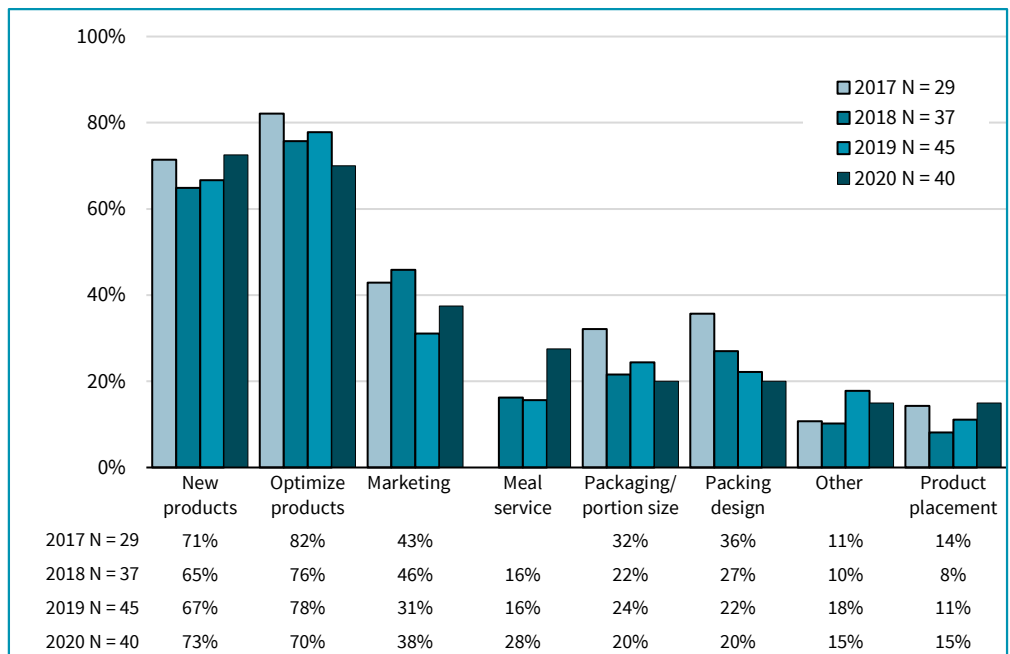
### 2.1 Measures for the individual priority areas

#### Priority area 1: Reduction of salt content in foods and the reduction of salt intake in the population through the Salt partnership.

- 40 out of 58 participants who signed responded
- 23 of the participants have their own goals for reducing salt, 20 measure themselves
- 24 have attended meetings, seminars or workshops during 2020

There are two areas of action that have been the most important within priority area 1, one is the launch of new products with less salt content and the other is to reduce the salt content in already existing products (optimisation see Figure 1). These have proven to be the most important measures, followed by marketing, throughout all the four years that the measures have been reported. Among the respondents, 8 represent the catering industry and 7 of them responded that they have made changes to what they offer with a view to reducing salt. A good example of how this is done is to ask customers whether the food should be seasoned or whether it should be salted.

Figure 1 Measures within Priority area 1: Reduction in salt implemented in 2017, 2018, 2019 and 2020.



When the participants are asked to specify the most effective measure they took during 2020, most point out the salt reduction in the existing products. This reduction in salt content is a gradual process and many of the participants have said that there

is a limit to how far you can reduce the salt content since the salt affects many properties of the food - both in terms of taste, consistency, and shelf life. Despite this, this is the measure that is still highlighted as the most effective. It has therefore been feared that a ceiling will be reached where this optimisation is no longer possible, but this limit has not yet been reached.

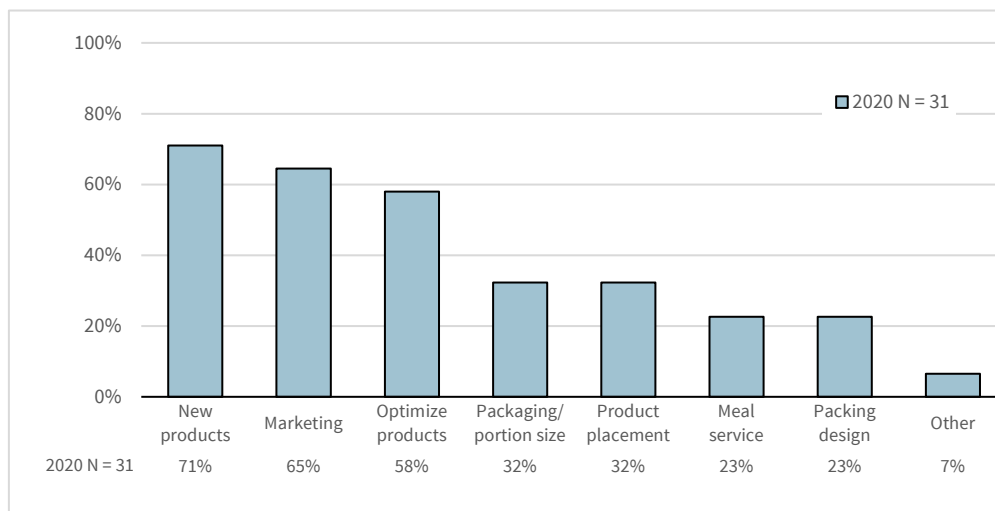
Several of the participants point out that they use the salt lists actively and that new products must satisfy the recommended salt targets. Furthermore, small changes in large volume products are very effective. Reference is also made to how there is a need to replace the salty taste with other flavours and that the gradual adopting of new habits for consumers is important.

### Priority area 2: Reduction of added sugar in foods and reduction in the population's intake of added sugar

- 31 out of 46 participants who signed responded
- 17 of the participants have their own goals for reducing added sugar, 15 measure themselves
- 12 have attended meetings, seminars or workshops during 2020

In the 2017 to 2019 annual reports, priority area 2 has been omitted from the reports. After the product taxes for chocolate and confectionery and non-alcoholic beverages increased in the state budget for 2018, the collaboration on reducing added sugar was put on hold. One of the consequences was that the food and beverage producers did not report activities for this priority area. Figure 2 therefore only shows the results for the self-report in 2020.

Figure 2 Measures within Priority area 2: Reduction in sugar implemented in 2020



The three most frequently used areas of action within this priority area are the development of new products, marketing, and optimisation of existing products.

Several of the participants point out a trend in the market: that products with little or no added sugar take a share from ones with sugar. This largely applies to water, but 'LITE' beer products and sugar-free drinks are also highlighted. When it comes to marketing, it is pointed out that some participants only use sugar-free drinks in photos and campaigns.

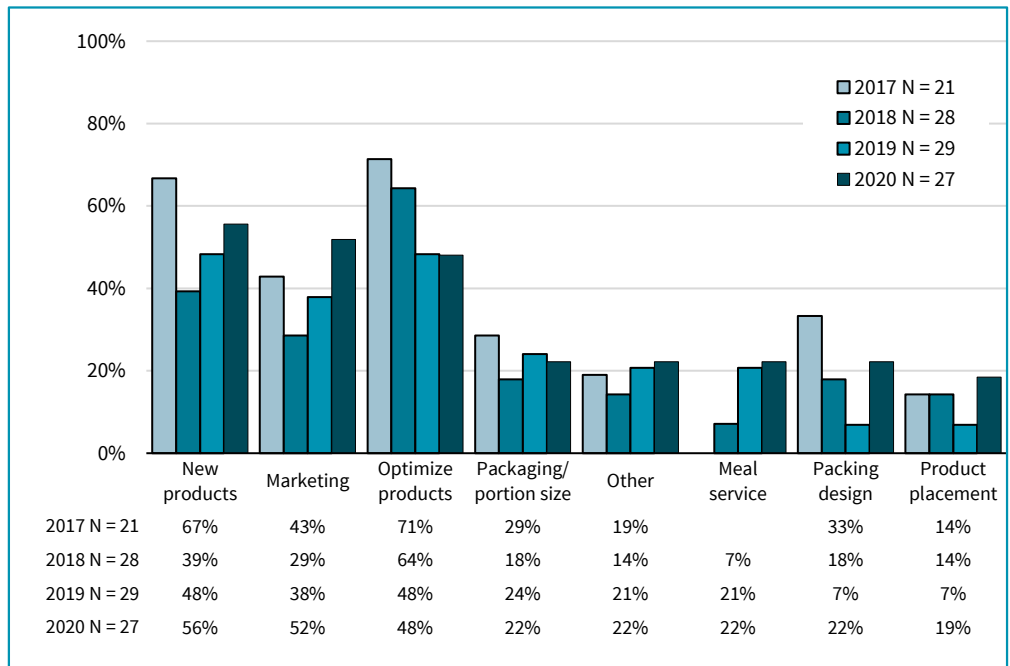
The fact that the market share of sugar-free water has now become greater than ones with sugar seems to be due to consumers demanding products without added sugar, at the same time as the "invisible" sugar reduction is important as an unconscious change that diners and customers do not notice. For example, there may be reduced portion sizes. For some products, customers will ask for one, for example for one ice cream or one cake, when the ice cream or cake becomes smaller, both saturated fat and sugar will be reduced.

**Priority area 3: Reduction of saturated fat in foods and reduction of the population's intake of saturated fat**

- 27 respondents out of 46 participants who signed
- 10 of the participants have their own goals for reducing saturated fat, all measure themselves
- 16 have attended meetings, seminars or workshops during 2020

The three most important measures within priority area 3, in 2020 as in previous years, are the development of new products, marketing and optimisation of existing products (see Figure 3). While priority areas 1 and 2 are about reducing added salt and sugar, priority area 3 is to a great extent about reducing a nutrient that is naturally found in the raw materials. For example, measures such as feeding experiments with pigs to reduce saturated fat are highlighted.

Figure 3 Measures within Priority area 3: Reduction in saturated fat implemented in 2017, 2018, 2019 and 2020.



Also within this priority area, the participants point out that small changes in large volume products are effective. Measures such as reducing saturated fat in the frying oil and replacing animal fat sources with plant-based ones are pointed out. For dairy products such as yoghurt and cheese, several products with less fat have been launched. In the catering industry, emphasis is placed on conscious marketing of leaner alternatives to diners.

**Priority area 4: Increase the population's intake of fruit and berries, vegetables, whole grain products and seafood by 20% by 2021**

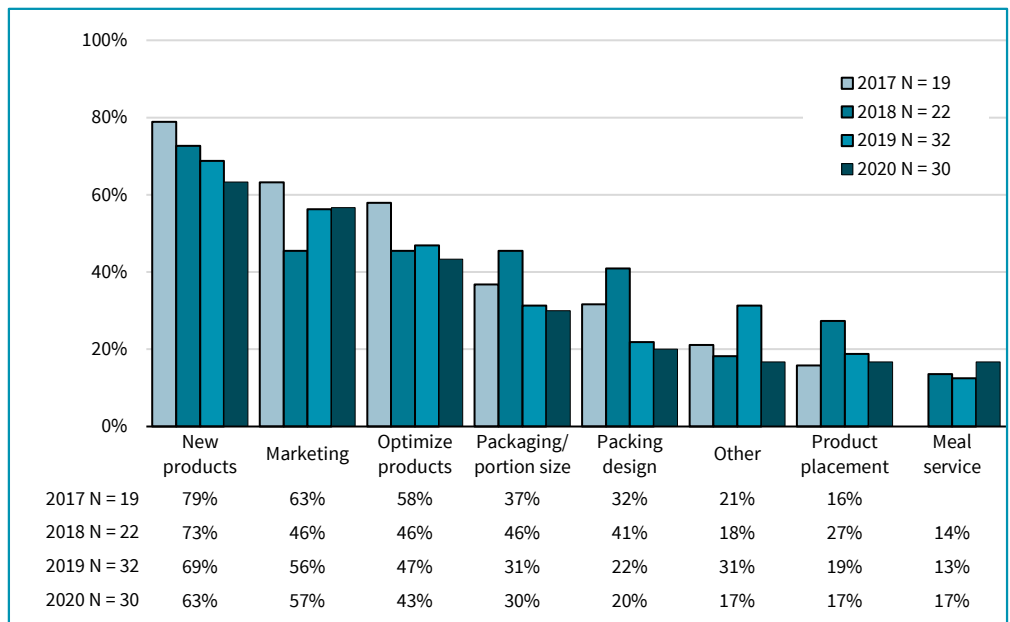
Priority area 4, also called #MerAv (MoreOf), differs from the three previous priority areas in that the goal is increased consumption of certain food groups and not reduced consumption of a single nutrient. This priority area is divided into three different sub-areas that report separately, namely 1) fruit, berries, and vegetables, 2) whole grain products and 3) fish and seafood.

**Fruits, berries, and vegetables**

- 30 respondents
- 14 have their own goals for increasing fruit, berries and vegetables, 12 measure themselves
- 11 have attended meetings, seminars or workshops during 2020

The most frequently reported measures related to increased intake of fruit, berries, and vegetables for all four years of self-reporting have been the development of new products, marketing, and optimisation of existing products. Although the number of responses is too small to say that these are significant differences from changes in packaging and portion sizes. One of the producers mentions a challenge for 2020, namely the challenges of lack of seasonal workers for the crop growing industry due to the corona pandemic and entry restrictions.

Figure 4 Measures within Priority area 4: Increased intake of fruit, berries and vegetables implemented in 2017, 2018, 2019 and 2020



Other measures were also affected by the corona pandemic, salad bars were closed and fruit at work ceased.

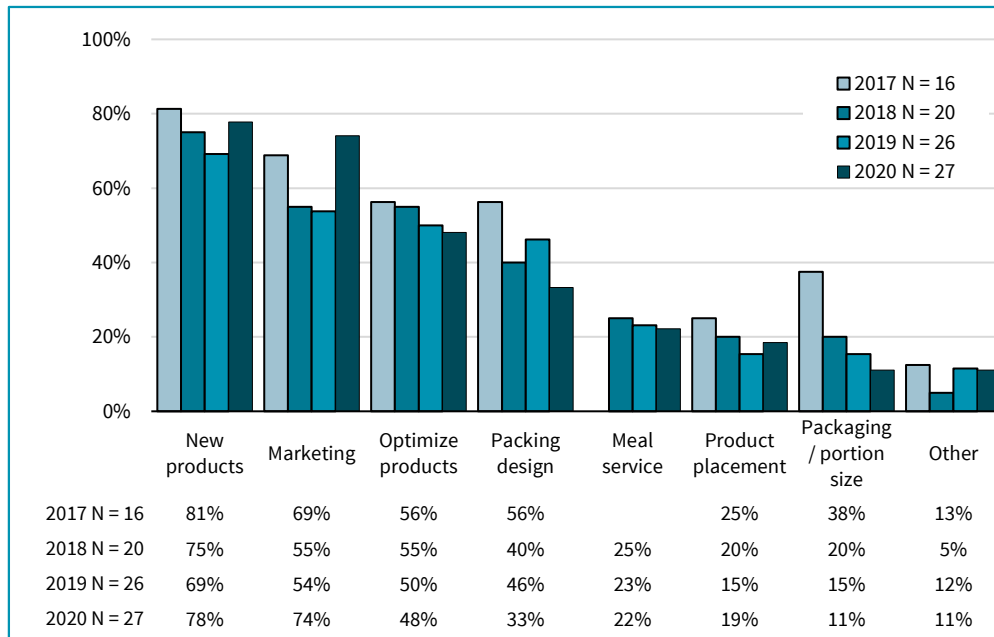
At the same time, many of the participants admit that the product development they have implemented has made it easier to eat more fruit, vegetables, and berries. By developing new dishes, increasing the vegetable content, and putting the focus on fruit and vegetables in pictures and other information material.

## Whole grain products

- 27 respondents
- 16 of the participants have their own goals for increasing whole grain products, 6 measure themselves
- 13 have attended meetings, seminars or workshops during 2020

Development of new products and marketing are the two most used forms of measures for whole grain products (see Figure 5).

Figure 5 Measures within Priority area 4: Increased intake of whole grain products in 2017, 2018, 2019 and 2020



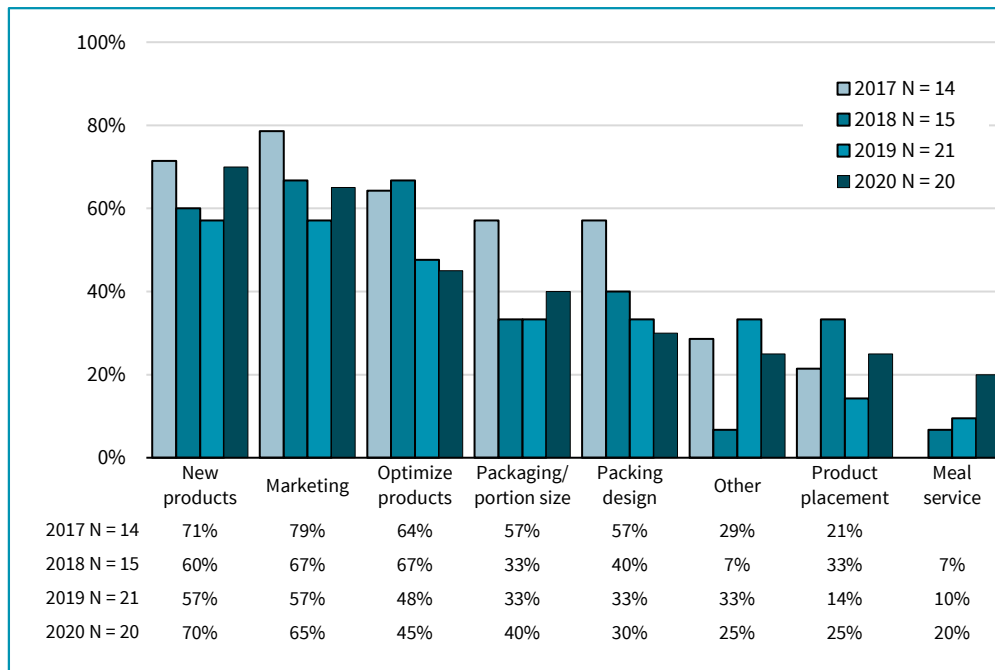
Several of the participants emphasize that when customers are faced with a choice between white and wholemeal bread when ordering sandwiches, burgers and the like, the proportion of the wholemeal option increases noticeably. Some participants say that by making the bread portfolio more wholemeal, the intake of wholemeal bread will automatically increase. However, several participants say that in practice most customers still prefer white bread products and claim that the distribution is about 65% white compared to 35% wholemeal bread products.

## Fish and seafood

- 20 respondents
- 12 participants have their own goals for increasing fish and seafood, 11 measure themselves
- 8 have attended meetings, seminars or workshops during 2020

The most important measures for increased consumption of fish and seafood in 2020 were the development of new products and marketing (see Figure 6). Other measures that are mentioned are changes to the menus so that fish dishes are listed with meat dishes.

Figure 6 Measures within Priority area 4: Increased intake of fish and seafood in 2017, 2018, 2019 and 2020



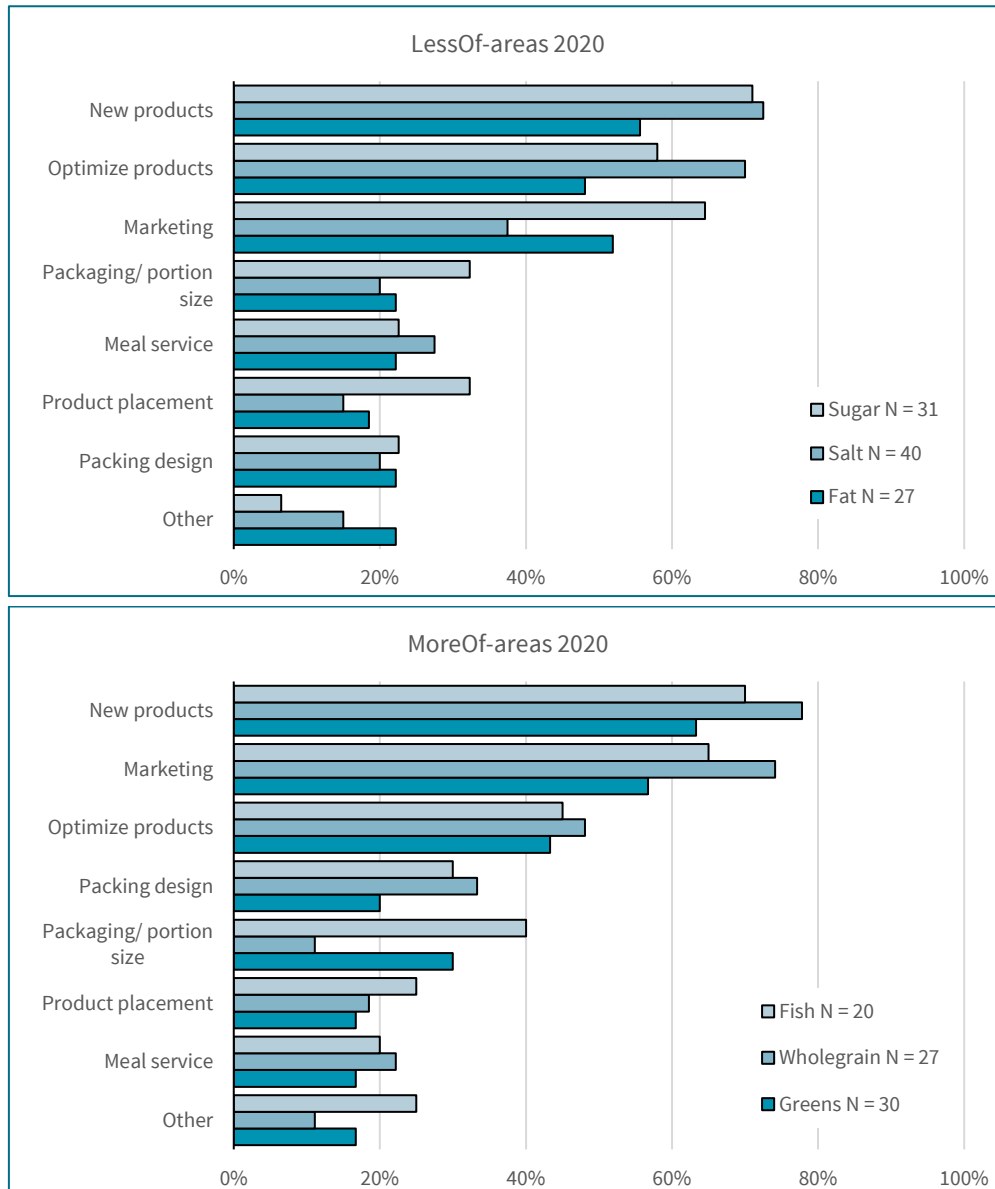
Many of the participants highlight various forms of campaigns to increase fish and seafood as the most effective measures. These can be store chains that have special weekdays with a focus on fish, pricing mechanisms with discounts and increased visibility online or in-store. Furthermore, it is also highlighted that emphasis is placed on developing new products that make it easier to eat more fish and seafood.



## 2.2 The participants measures are summarized

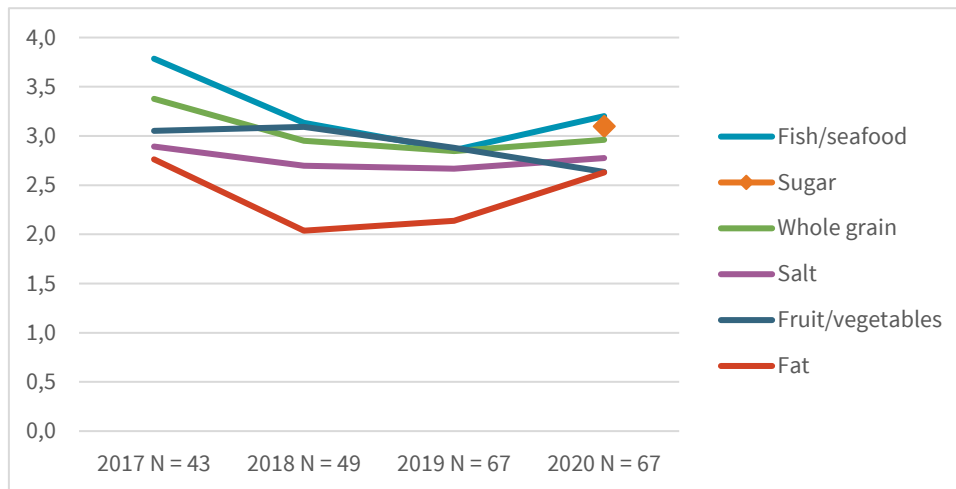
For both the priority areas 1, 2 and 3, the so-called *MindreAv (LessOf)*- areas and for priority area 4, *#MerAv (MoreOf)*, the development of new products, optimisation of existing products and marketing are the most important measures in 2020 (see Figure 7). This is the same trend as we have seen in previous self-reports.

Figure 7 Overall overview of measures within all the priority areas in 2020.



Since 2020 has been so marked by the pandemic and pandemic measures, we have also looked at the total number of types of measures within each priority area. Figure 8 shows the total number of types of measures per priority area divided by the number of participants in this priority area. This average figure shows approximately the same level of the number of measures in 2020 as in previous years. So despite the fact that some of the participants clearly say that the pandemic has affected their measures, the overall assessment is that there has been no change overall.

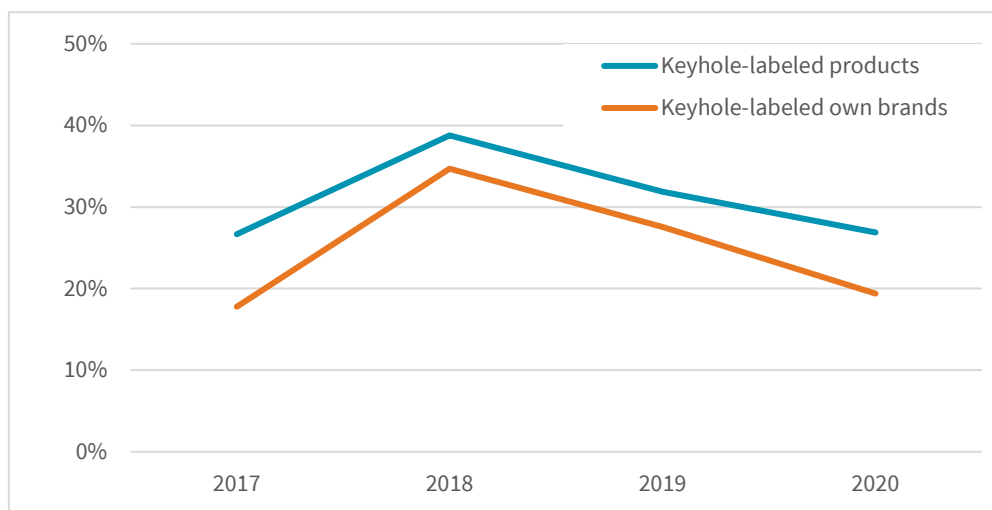
Figure 8 Number of different types of measures per priority area per participants per year - Priority area 2, reduction of added sugar has only been reported in 2020 (for the number of responses per priority area per year: see table 1)



## Keyhole symbol

Eighteen of the 67 respondents report that they have products with the keyhole symbol in their 2020 range. As Figure 9 shows, there seems to have been a certain decrease in the proportion of participants with keyhole products from 2018. Eight of the participants from 2020 have less than ten products in their range, five have between ten and hundred products and five have over a hundred, of which two have 1200 and 1500 products, respectively. A total of 3411 keyhole-labelled products have been reported. These are not unique products, several participants report the same product, for example, manufacturers, grocery stores and restaurants will report some of the same products. There are also some products that are sold in several or all grocery chains. The decline in keyhole-labelled goods from 2019 to 2020 still corresponds with the decline that AC Nielsen has reported to the Norwegian Directorate of Health, they have reported 1650 keyhole-labelled products in the grocery trade in Norway in 2020, slightly lower than in 2019.

Figure 9 Proportion of participants who report keyhole-labelled products



There were 13 participants in 2020 who had keyhole-labelled products among the company's own brands. This is also a certain decline from 2018, as shown in the figure. Eight of the participants reported new products with the keyhole symbol in 2020. In total, they reported 121 new products, about 3.5 percent. This also with the proviso that we do not know if several participants have reported on the same product.

# 3 The participants assessment of the agreement

## 3.1 Assessment of the agreement

In addition to reporting what measures the participants have implemented, they were asked to assess the agreement on three points: how satisfied they are with the agreement for their own company, whether they feel they get something in return for the agreement and how difficult it is for their company to achieve the goals in the agreement.

Figure 10 Average rating of the agreement (1-6: 6 = Very happy with the agreement; Have responded very much again for the agreement; and Very easy)

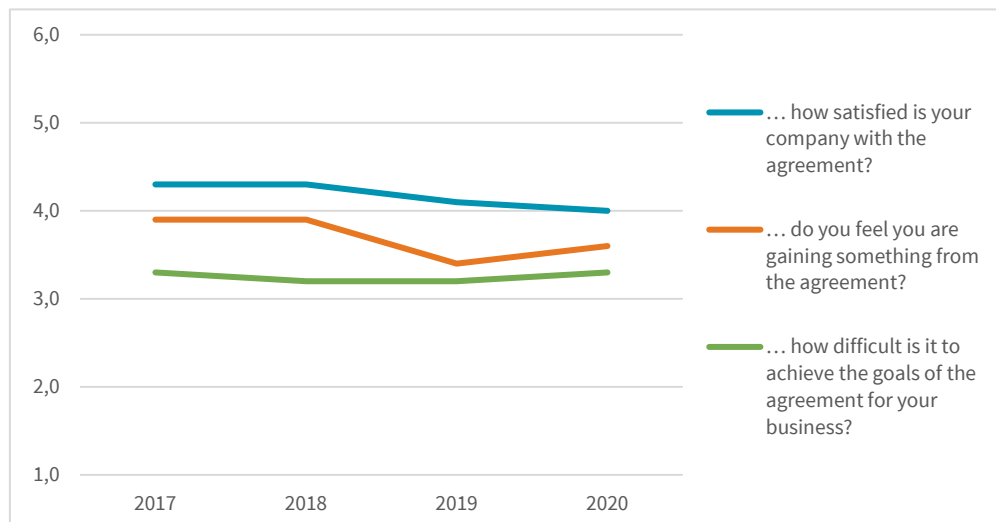


Figure 10 shows the same trend from year to year. The participants are quite satisfied with the agreement (average 4.0 in 2020). They think they get quite a lot in return for it (average 3.6 in 2020). But they think it is somewhat more difficult to achieve the agreement's goal, (average 3.3 in 2020). These are similar rankings as before, but it is worth noting that there is a declining proportion who say they are very satisfied with the agreement and an increasing proportion who find it difficult for their company to achieve the agreement's goals.

### Motivation:

In the open question of the main motivation for joining the agreement, there are three main areas that are highlighted by the participants:

- Part of the company's social responsibility to promote public health
- Increased sales and/or improved competitiveness
- Binding cooperation between the authorities and the food and beverage industry

This is the same trend as shown in previous reports. Most people point out that the main motivation is clearly the companies' social responsibility to promote public health. This motivation goes hand in hand with the motivation for increased sales, to which one of the participants responded:

Contribute to better public health. An important part of our work with social responsibility and sustainability. Sell more healthy products.

Some also point out the uniqueness of the letter of intent in having the entire industry gathered in dialogue with the authorities:

Ensure that we achieve the goals in the letter of intent through good dialogue and cooperation with the authorities and at the same time having predictable and stable framework conditions.

### **Exchange**

When asked what the participants think they have gained the most from, there are two areas in particular that are noted by many this year as well:

- Cross-sectoral collaboration
- Focus and awareness

When it comes to cross-sectoral collaboration, this is both a collaboration throughout the value chain across companies and a collaboration between the food industry and the health authorities. It is highlighted as positive that the collaboration leads to an increased understanding of what direction the authorities want the population and the industry to move from a longer-term perspective. Information and meetings arranged by, or with the help of the Norwegian Directorate of Health, are seen as positive. At the same time, there are some who state that the authorities can do more to market the initiative in the population.

For cooperation through the value chain, reference is made to the importance of joint discussions with the rest of the industry to find solutions to common challenges. They also state that cooperation means that the industry as a whole can achieve greater goals than the individual could manage on their own.

### **Effect**

The respondents were also asked to state which type of measure gives the best effect, regardless of the priority area. The effect is assessed on the basis of being able to maintain or increase turnover, at the same time as they work towards achieving the intentions in the agreement with reduced salt, added sugar and saturated fat and increased fruit and vegetables, whole grains, and fish. The effect must be noticeable from both fulfilling the companies' profitability and being able to contribute from a public health perspective.

Not surprisingly, the responses are in line with what was stated for the individual priority areas: product development, optimisation of existing products and various marketing measures. At the same time, there are several who responded that having common goals and thinking long-term is very important to achieve the desired goals. But it is also pointed out that since there is a lack of recent data on the Norwegian diet, it is difficult to say anything about the agreement - therefore what is most positive is that there is a dialogue between authorities and producers.

What is also mentioned is that it is difficult to state the effect of individual measures, it is probably better to combine several at the same time.

## Challenges

There are several factors that are highlighted as particularly demanding:

**Changing products** is something that has been highlighted in this and all the previous reports. It is difficult to reduce salt, added sugar and saturated fat drastically and at the same time preserve the taste, consistency, structure, shelf life and other properties of the food. It is also a dilemma whether to make a gradual change in an existing product over time and thereby try to reach all consumers of this product or whether to launch a healthier product in parallel that reaches the consumer group that wants it. For a manufacturer, it can be challenging to alter a product that is already selling well.

**Changing habits** of consumers is also challenging. There is little point in developing new products or altering existing products if consumers do not want them. One of the participants responded that there is little demand for low-fat dairy products and that this is partly due to the fact that people do not perceive cheese as unhealthy. The challenge is to reach consumers with the right products.

**Covid-19** is a new challenge for 2020. The lockdown has had different consequences for the various participants. Most of the health authorities' message to the population has been about pandemic measures and to a lesser extent than planned about campaigns related to the Letter of Intent. Some of the participants have therefore interpreted it as if the agreement was shelved in 2020. The focus area where the most expressed negative changes due to the pandemic was *Priority area 4 Increased intake of fruit, vegetables, and berries*. Closing of salad counters in the stores, canteens at workplaces and cancellation of fruit at work are all factors that have affected the total intake.

**Border trade and taxes** is an area that in all the previous reports has been seen as very challenging by the food industry. With the closure of the borders on 12 March 2020 due to covid-19, there was an abrupt stop in cross-border trade. These are, of course, measures that were in no way initiated by the Letter of Intent. One of the participants stated that for some time there has been little political understanding of the border trade problem and the large differences in taxes on beverages between Norway and Sweden. They hope the tax reduction in 2021 was the first step towards a harmonisation of taxes to neighbouring countries. Another states that the intention of the agreement is good but believes that the tax policy has worked against the agreement. They point out that reduced sugar products have been charged the same tax as products with sugar and that the situation until the tax change was adopted has led to a penalty instead of a reward for developing products with less sugar.

**Monitoring** is something that has been highlighted as challenging in all self-reports, including in this year's reporting. Lack of good data on goal achievement by the authorities is seen as problematic.

**The regulations** are also perceived as challenging. Strict marketing rules prevent participants from conveying good initiatives. They state that it takes a lot of effort for them to be able to be within the rules so that they can really promote a message.

**Ambitious goals**, which take longer to achieve than the participants initially thought, are a challenge. Some of the small participants say that these goals are not adapted to small businesses but believe that they can be a tool for the large leading companies, where it can pay off.

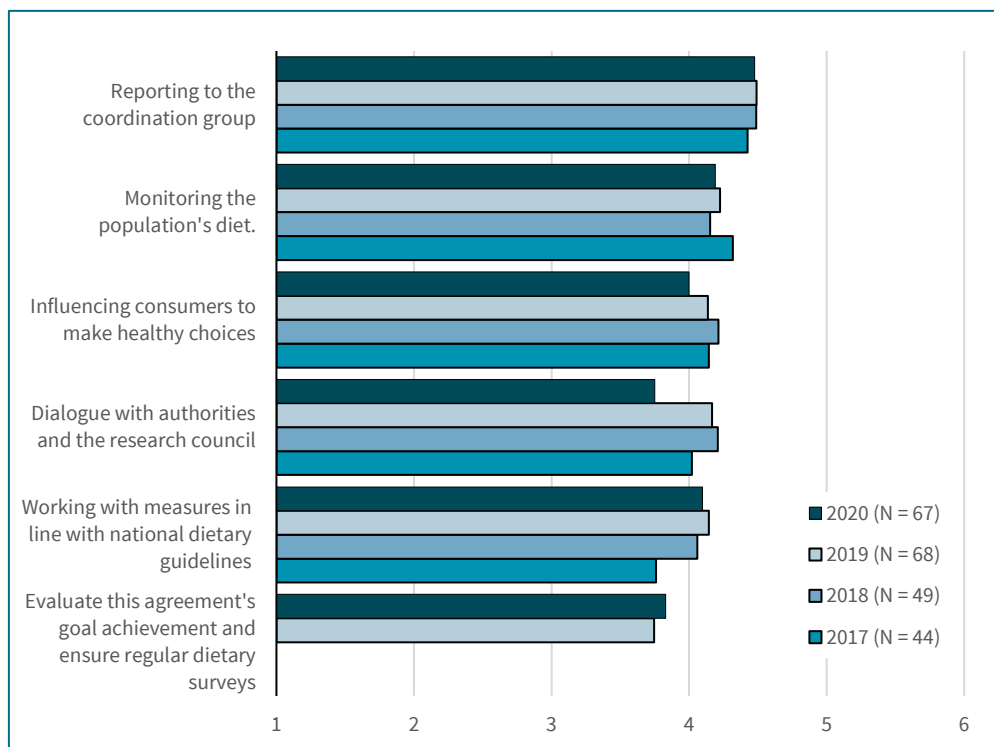
### 3.2 Assessment by the health authorities

The Ministry of Health and Care Services represents the health authorities in the agreement and they have committed to six points:

- a) Reporting to the coordination group on activities and overall goal achievement
- b) Monitoring the population's diet
- c) Working with systematic measures that promote public health in general and increase the proportion of the population who have a diet that is in line with the national dietary guidelines.
- d) Influencing consumers through communication and implementing other systematic measures to make healthy choices easier
- e) Dialogue and interaction with other relevant authorities and the Research Council of Norway related to the objectives of the letter of intent.
- f) Collect data to evaluate this agreement's goal achievement and work to ensure that regular, representative dietary surveys are conducted.

Each year, participants are asked to assess how the health authorities respond to these commitments on a scale where 1 is the worst and 6 the best. As shown Figure 11, the assessments are fairly similar from year to year. The area that stands out in 2020 is a lower score for point d - *Influence the consumer through communication and implement other systematic measures that make it easier to make healthy choices*. This commitment is considered the most important task for the health authorities within the letter of intent for 17 participants (25%). What is seen as the most important commitment for most participants, 28 respondents (57%) is *working on systematic measures that promote public health in general and increase the proportion of the population who have a diet in line with the national dietary guidelines*.

Figure 11 The participants' assessment of how the health authorities are meeting their obligations in 2017, 2018, 2019 and 2020. 1 = very poor, 6 = very good. Point F was not phrased correctly in 2017/18.



The participants were asked to point out measures that the health authorities had taken during 2020 that benefited their own activities. Many pointed out the very important role of the health authorities in terms of information, marketing and arranging seminars. What is also pointed out is the role as a coordinating body and facilitating for the collaboration to work. New for 2020 was the award for a healthier diet, which is highlighted as positive by several participants.



# Main findings

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As mentioned in the introduction, the follow-up evaluation of the letter of intent focuses mainly on three factors: 1) what measures the participants introduce to achieve the goals of the agreement, 2) how effective they believe the letter of intent is as a way to work, and 3) whether they believe the agreement is a good tool for promoting a good national diet.

In all areas of the letter of intent, the introduction of new products, marketing, and changes in product content (optimisation), are the measures most used by the participants to achieve the agreement's objectives. This has been the case since the beginning. The only change in this picture for 2020 compared to previous years is a slight decrease in product optimisation, which applies to all areas of the agreement. The same small change could be seen in 2019, which may indicate that this is the start of a trend. Unlike the introduction of new products and the associated marketing of these, which is a continuous process in a market, product optimisation is a gradual process with a limit to how much change consumers are willing to accept. In this sense, a trend with less emphasis on optimisation over time is not surprising.

Another element that is highlighted among the measures is the development of new products. Here it is required not only that the producers think they have found a good product, but also that the consumers want it. The interaction between product development/optimisation and marketing and information is seen as very important.

The year 2020 has been marked by covid-19. It affected the participants in the letter of intent in various ways. One of the consequences was that much of the planned information work that the health authorities had planned around the objectives of the letter of intent could not be carried out because the health authorities had to focus their resources and target health information campaigns around managing the pandemic.

Another result of the pandemic was the abrupt halt in cross-border trade. While the participants in previous years have pointed to problems related to cross-border trade, this has been minimal from March 2020. It would be useful to follow up with own studies of the effects this sharp reduction in cross-border trade has had on the population's diet and lessons to be learned in the continued work of the letter of intent.

The vast majority of participants (61 out of 67 respondents) state that they are partly or very satisfied with the agreement for their own companies. The same picture applies to how much the participants think they get in return for joining the agreement, where 52 of 67 respondents think they get something or a lot in return for participating. Compared to previous years, there are a few more participants who state that they are dissatisfied with the agreement for their own companies and fewer who say they are very satisfied. In terms of how difficult it is for the participants to achieve the agreement's objectives for their own companies, 19 out of 67 respondents state that it is experienced as difficult, while 9 out of 67 report that it does not feel difficult. This picture has not changed significantly since the start of the agreement, although the proportion of participants who feel that it is difficult to achieve the agreement's objectives for their companies has increased somewhat since the beginning.

It is without a doubt covid-19 that is highlighted as what has characterised the activities of many of the participants in the reporting year. But it is also pointed out to resume the work in Priority area 2: Reducing added sugar has been challenging and important. The award in healthier diets, which was introduced in 2020, is seen as a good measure.

In order for the participants to be able to assess whether the agreement is a good tool for achieving the goals in the letter of intent and thereby contributing to a good national diet, good data is required. Also in 2020, work has been done to put in place a good monitoring system for this. In order to be able to assess the effect of the letter of intent on the population, it is very important to give the work of this monitoring high priority.

# Appendix 1 Questionnaire



## Appendix 1: Questionnaire

### The letter of intent for a healthier diet

Reporting is voluntary.

The form is assessed according to competition regulations by the Norwegian Directorate of Health.

| Business background   |  |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
|---|--|---------------------------------------|--------------------------|--|--------------------------|--|--------------------------|---|--------------------------|---|--------------------------|--|--------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|-------------------------|--------------------------|---------------|--------------------------|
| B1  | Business name  |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B2  | Location of head office  |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B3  | Is your business nationwide or local? <table style="margin-left: 20px;"> <tr> <td>1. Nationwide</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Local</td> <td><input type="checkbox"/></td> </tr> </table>   | 1. Nationwide                         | <input type="checkbox"/> | 2. Local                                     | <input type="checkbox"/> |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| 1. Nationwide   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| 2. Local  | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B4  | Total turnover last year (use numbers) <table style="margin-left: 20px;"> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> <tr> <td>1. Prefer not to answer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Don't know</td> <td><input type="checkbox"/></td> </tr> </table> | <input type="text"/>                  | <input type="text"/>     | <input type="text"/>                         | <input type="text"/>     | <input type="text"/>                           | <input type="text"/>     | <input type="text"/>  | <input type="text"/>     | <input type="text"/>                                      | <input type="text"/>     | <input type="text"/>                                     | <input type="text"/>     | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 1. Prefer not to answer | <input type="checkbox"/> | 2. Don't know | <input type="checkbox"/> |
| <input type="text"/>  | <input type="text"/>   | <input type="text"/>                  | <input type="text"/>     | <input type="text"/>                         | <input type="text"/>     | <input type="text"/>                           | <input type="text"/>     | <input type="text"/>  | <input type="text"/>     | <input type="text"/>                                      | <input type="text"/>     | <input type="text"/>                                     | <input type="text"/>     | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |                      |                      |                         |                          |               |                          |
| 1. Prefer not to answer   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| 2. Don't know   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B5  | Number of employees (use numbers) <table style="margin-left: 20px;"> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> <tr> <td>1. Prefer not to answer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Don't know</td> <td><input type="checkbox"/></td> </tr> </table>      | <input type="text"/>                  | <input type="text"/>     | <input type="text"/>                         | <input type="text"/>     | <input type="text"/>                           | <input type="text"/>     | <input type="text"/>  | <input type="text"/>     | <input type="text"/>                                      | <input type="text"/>     | <input type="text"/>                                     | <input type="text"/>     | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 1. Prefer not to answer | <input type="checkbox"/> | 2. Don't know | <input type="checkbox"/> |
| <input type="text"/>  | <input type="text"/>   | <input type="text"/>                  | <input type="text"/>     | <input type="text"/>                         | <input type="text"/>     | <input type="text"/>                           | <input type="text"/>     | <input type="text"/>  | <input type="text"/>     | <input type="text"/>                                      | <input type="text"/>     | <input type="text"/>                                     | <input type="text"/>     | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |                      |                      |                         |                          |               |                          |
| 1. Prefer not to answer   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| 2. Don't know   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B6  | Type of business <table style="margin-left: 20px;"> <tr> <td>a. Manufacturer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>b. Wholesaler</td> <td><input type="checkbox"/></td> </tr> <tr> <td>c. Agent</td> <td><input type="checkbox"/></td> </tr> <tr> <td>d. Industry organization/health authority</td> <td><input type="checkbox"/></td> </tr> </table> <i>Select all that are relevant</i>  | a. Manufacturer                       | <input type="checkbox"/> | b. Wholesaler                                | <input type="checkbox"/> | c. Agent                                       | <input type="checkbox"/> | d. Industry organization/health authority                           | <input type="checkbox"/> |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| a. Manufacturer   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| b. Wholesaler   | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| c. Agent  | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| d. Industry organization/health authority                           | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| B7  | Link to the agreement <table style="margin-left: 20px;"> <tr> <td>a. Priority area 1: Reduction of salt</td> <td><input type="checkbox"/></td> </tr> <tr> <td>b. Priority area 2: Reduction of added sugar</td> <td><input type="checkbox"/></td> </tr> <tr> <td>c. Priority area 3: Reduction of saturated fat</td> <td><input type="checkbox"/></td> </tr> <tr> <td>d. Priority area 4: Increased intake of fruits, berries, vegetables</td> <td><input type="checkbox"/></td> </tr> <tr> <td>e. Priority area 4: Increased intake of whole grain foods</td> <td><input type="checkbox"/></td> </tr> <tr> <td>f. Priority area 4: Increased intake of fish and seafood</td> <td><input type="checkbox"/></td> </tr> </table> <i>Select all that are relevant</i>   | a. Priority area 1: Reduction of salt | <input type="checkbox"/> | b. Priority area 2: Reduction of added sugar | <input type="checkbox"/> | c. Priority area 3: Reduction of saturated fat | <input type="checkbox"/> | d. Priority area 4: Increased intake of fruits, berries, vegetables | <input type="checkbox"/> | e. Priority area 4: Increased intake of whole grain foods | <input type="checkbox"/> | f. Priority area 4: Increased intake of fish and seafood | <input type="checkbox"/> |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| a. Priority area 1: Reduction of salt                               | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| b. Priority area 2: Reduction of added sugar                        | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| c. Priority area 3: Reduction of saturated fat                      | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| d. Priority area 4: Increased intake of fruits, berries, vegetables | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| e. Priority area 4: Increased intake of whole grain foods           | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |
| f. Priority area 4: Increased intake of fish and seafood            | <input type="checkbox"/>   |                                       |                          |  |                          |  |                          |   |                          |   |                          |  |                          |                      |                      |                      |                      |                      |                      |                      |                      |                         |                          |               |                          |

Priority area 1: Reduction of salt

[Only to be answered by those who have checked B7a on page 1]

|   |  |   |
|---|--|---|
| SA1   | Have you set your own goals for salt reduction?  | 1: Yes<br>2: No→SA4   |
| SA2   | Do you monitor the development of the salt reduction targets yourself?   | 1: Yes<br>2: No→SA4   |
| SA3   | How often is it measured?  | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other..... |
| <b>SA4 Has your company implemented any of the following measures in relation to Priority area 1: Reduction of salt within the agreement in 2020?</b> |  |   |
| a   | Development and launch of new product(s)   | 1: Yes 2: No 3: Not applicable  |
| b   | Optimizing existing product(s)   | 1: Yes 2: No 3: Not applicable  |
| c   | Changed packaging or portion size (intended to influence healthier choices)  | 1: Yes 2: No 3: Not applicable  |
| d   | Change of packaging design, retail pack (intended to influence healthier choices)  | 1: Yes 2: No 3: Not applicable  |
| e   | Marketing initiatives  | 1: Yes 2: No 3: Not applicable  |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)                                | 1: Yes 2: No 3: Not applicable  |
| g   | Other measures implemented   | 1: Yes 2: No  |
| <i>If yes, please describe</i> .....  |  |   |
| SA5   | What was the most effective measure you took in 2020?  | .....   |
| SA6   | Why was this measure effective?  | .....   |
| SA7   | Has anyone from your company attended meetings/seminars/workshops within Priority area 1: Reduction of salt during 2020? | 1: Yes 2: No 3: Not applicable  |

Priority area 2: Reduction of added sugar

[Only to be answered by those who have ticked B7b on page 1]

|     |   |  |
|-----|---|--|
| SU1 | Have you set your own goals for reducing added sugar?   | 1: Yes<br>2: No → SU4  |
| SU2 | Do you monitor progress in relation to the goals of reducing added sugar?   | 1: Yes<br>2: No → SU4  |
| SU3 | How often are they measured?  | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other |
| SU4 | <b>Has your company taken any of the following measures in connection with Priority area 2 within the agreement in 2020?</b>        |  |
| a   | Development and launch of new product(s)  | 1: Yes 2: No 3: Not applicable   |
| b   | Optimizing existing product(s)  | 1: Yes 2: No 3: Not applicable   |
| c   | Changed packaging or portion size (intentionally affecting healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| d   | Change of packaging design, retail pack (intended to influence healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| e   | Marketing initiatives   | 1: Yes 2: No 3: Not applicable   |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| g   | Other measures implemented within "Priority area 2: Reduction of added sugar" last year?<br><i>If yes, please describe</i>          | 1: Yes 2: No<br>.....  |
| SU5 | What was the most effective measure you implemented in 2020?  | .....  |
| SU6 | Why was this measure effective?   | .....  |
| SU7 | Has anyone from your company participated in meetings/seminars/workshops for Priority area 2: Reduction of added sugar during 2020? | 1: Yes 2: No 3: Not applicable   |

Priority area 3: Reduction of saturated fat

[Only to be answered by those who have ticked B7c on page 1]

|     |  |  |
|-----|--|--|
| FE1 | Have you set your own goals for reducing saturated fat?  | 1: Yes<br>2: No → FE4  |
| FE2 | Do you monitor the development in relation to the goals for reducing saturated fat yourself?   | 1: Yes<br>2: No → FE4  |
| FE3 | How often is it measured?  | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other |
| FE4 | <b>Has your company taken any of the following measures in relation to Priority area 3 within the agreement in 2020?</b>                 |  |
| a   | Development and launch of new product(s)   | 1: Yes 2: No 3: Not applicable   |
| b   | Optimizing existing product(s)   | 1: Yes 2: No 3: Not applicable   |
| c   | Changed packaging or portion size (intentionally affecting healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| d   | Change of packaging design, retail pack (intentionally affecting healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| e   | Marketing initiatives  | 1: Yes 2: No 3: Not applicable   |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| g   | Other measures implemented within "Priority area 3: Reduction of saturated fat" last year?<br><i>If yes, please describe</i>             | 1: Yes 2: No<br>.....  |
| FE5 | What was the most effective measure you implemented in 2020?   | .....  |
| FE6 | Why was this measure effective?  | .....  |
| FE7 | Has anyone from your company participated in meetings/seminars/workshops within Priority area 3: Reduction of saturated fat during 2020? | 1: Yes 2: No 3: Not applicable   |

Priority area 4: Increased intake of fruits, berries, vegetables

[Only to be answered by those who have ticked B7d on page 1]

|     |   |  |
|-----|---|--|
| FG1 | Have you set your own goals for increasing the intake of fruit, berries and vegetables?   | 1: Yes<br>2: No → FG4  |
| FG2 | Do you monitor the development in relation to the goals of increased intake of fruits, berries and vegetables?  | 1: Yes<br>2: No → FG4  |
| FG3 | How often is it measured?   | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other |
| FG4 | <b>Has your company taken any of the following measures in relation to Priority area 4: Increased intake of fruits, berries, vegetables within the agreement in 2020?</b> |  |
| a   | Development and launch of new product(s)  | 1: Yes 2: No 3: Not applicable   |
| b   | Optimizing existing product(s)  | 1: Yes 2: No 3: Not applicable   |
| c   | Changed packaging or portion size (intentionally affecting healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| d   | Change of packaging design, retail pack (intentionally affecting healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| e   | Marketing initiatives   | 1: Yes 2: No 3: Not applicable   |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| g   | Other measures implemented within "Priority area 4: Increased intake of fruits, berries, vegetables" last year?<br><i>If yes, please describe</i>                         | 1: Yes 2: No<br>.....  |
| FG5 | What was the most effective measure implemented in 2020?  | .....  |
| FG6 | Why was this measure effective?   | .....  |
| FG7 | Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of fruits, berries, vegetables during 2020?             | 1: Yes 2: No 3: Not applicable   |

Priority area 4: Increased intake of whole grain foods

[Only to be answered by those who have ticked B7e on page 1]

|     |   |  |
|-----|---|--|
| KO1 | Have you set your own goals for increasing the intake of whole grain foods?   | 1: Yes<br>2: No → KO4  |
| KO2 | Do you monitor developments in relation to the goal of increasing the intake of whole grain foods?  | 1: Yes<br>2: No → KO4  |
| KO3 | How often is it measured?   | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other |
| KO4 | <b>Has your company taken any of the following measures in relation to Priority area 4: Increased intake of whole grain foods within the agreement in 2020?</b> |  |
| a   | Development and launch of new product(s)  | 1: Yes 2: No 3: Not applicable   |
| b   | Optimizing existing product(s)  | 1: Yes 2: No 3: Not applicable   |
| c   | Changed packaging or portion size (intentionally affecting healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| d   | Change of packaging design, retail packk (intentionally affecting healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| e   | Marketing initiatives   | 1: Yes 2: No 3: Not applicable   |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)   | 1: Yes 2: No 3: Not applicable   |
| g   | Other measures implemented within "Priority area 4: Increased intake of whole grain foods" last year?<br><i>If yes, please describe</i>                         | 1: Yes 2: No<br>.....  |
| KO5 | What was the most effective measure implemented in 2020?  | .....  |
| KO6 | Why was this measure effective?   | .....  |
| KO7 | Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of whole grain foods during 2020?             | 1: Yes 2: No 3: Not applicable   |



Priority area 4: Increased intake of fish and seafood

[Only to be answered by those who have ticked B7e on page 1]

|     |  |  |
|-----|--|--|
| F11 | Have you set your own goals for increasing the intake of fish and seafood?   | 1: Yes<br>2: No → F14  |
| F12 | Do you monitor your own development in relation to the goal of increasing the intake of fish and seafood?  | 1: Yes<br>2: No → F14  |
| F13 | How often is it measured?  | 1: Monthly or more often<br>2: Quarterly<br>3: Biannually<br>4: Annually<br>5: Other |
| F14 | <b>Has your company taken any of the following measures in relation to Priority area 4: Increased intake of fish and seafood within the agreement in 2020?</b> |  |
| a   | Development and launch of new product(s)   | 1: Yes 2: No 3: Not applicable   |
| b   | Optimizing existing product(s)   | 1: Yes 2: No 3: Not applicable   |
| c   | Changed packaging or portion size (intentionally affecting healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| d   | Change of packaging design, retail pack (intentionally affecting healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| e   | Marketing initiatives  | 1: Yes 2: No 3: Not applicable   |
| f   | Changed product placement in retail outlets (intentionally influencing healthier choices)  | 1: Yes 2: No 3: Not applicable   |
| g   | Other measures implemented within "Priority area 4: Increased intake of fish and seafood" last year?<br><i>If yes, please describe</i>                         | 1: Yes 2: No<br>.....  |
| F15 | What was the most effective measure implemented in 2020?   | .....  |
| F16 | Why was this measure effective?  | .....  |
| F17 | Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of fish and seafood during 2020?             | 1: Yes 2: No 3: Not applicable   |

The keyhole symbol

|      |   |  |
|------|---|--|
| NO1  | Total number of products with the keyhole symbol in 2020                          | <input type="text"/> <input type="text"/> <input type="text"/> |
|      |   | Don't know; Not applicable                                     |
| NO1b | How many products in the entire range are the company's own brands? (use numbers) | <input type="text"/> <input type="text"/> <input type="text"/> |
|      |   | Don't know; Not applicable                                     |
| NO2  | Number of new products with the keyhole symbol in 2020                            | <input type="text"/> <input type="text"/> <input type="text"/> |
|      |   | Don't know; Not applicable                                     |
| NO2b | How many of the new products in 2020 were the company's own brands? (use numbers) | <input type="text"/> <input type="text"/> <input type="text"/> |
|      |   | Don't know; Not applicable                                     |

The participants' assessment of the agreement

|     |   |             |
|-----|---|-------------|
| AV1 | How satisfied is your company with the agreement?<br><i>1 = Not satisfied at all</i><br><i>6 = Very satisfied</i>   | 1 2 3 4 5 6 |
| AV2 | Do you feel you are gaining something from the agreement?<br><i>1 = Haven't gained anything from the agreement</i><br><i>6 = Have gained a lot from the agreement</i> | 1 2 3 4 5 6 |
| AV3 | What do you think you have gained the most from?  | .....       |
| AV4 | How difficult is it for your company to achieve the goals of the agreement?<br><i>1 = Very difficult</i><br><i>6 = Very easy</i>                                      | 1 2 3 4 5 6 |
| AV5 | What is particularly challenging?   | .....       |
| AV6 | What kind of measures give the best result?   | .....       |
| AV7 | What is your main motivation for joining the agreement?   | .....       |

| The participants' assessment of the health authorities |   |
|--|---|
| AV9  | What measures significant to your business do you feel that <i>the health authorities</i> have taken in relation to the agreement during 2020?<br>.....<br>None; Not applicable   |
| AV10   | What measures significant to the entire agreement do you feel that <i>the health authorities</i> have taken during 2020?<br>.....<br>None; Not applicable   |
| AV11   | How well do you think <i>the health authorities</i> fulfil their obligations within the following fields?<br>1= Very badly<br>6= Very well<br>9= Don't know   |
|  | a. Monitoring the population's diet 1 2 3 4 5 6 9   |
|  | b. Obtaining data to evaluate the performance of this agreement and working towards its implementation 1 2 3 4 5 6 9  |
|  | c. Fielding regular representative dietary surveys 1 2 3 4 5 6 9  |
|  | d. Working with systematic measures that promote public health in general and increase the proportion of the population who have a diet that is in line with the national dietary advice. Having a special focus on children and young people 1 2 3 4 5 6 9 |
|  | e. Reporting to the coordination group on measures and overall goal achievement 1 2 3 4 5 6 9   |
|  | f. Influencing consumers through communication and taking other systematic measures to make healthy choices easier 1 2 3 4 5 6 9  |
|  | g. Participating in dialogue and interaction with other relevant authorities and the Research Council related to the objectives of the letter of intent. 1 2 3 4 5 6 9  |
| AV12   | From your business perspective, what is the most important commitment for the <i>health authorities</i> (of those mentioned above)<br>Tick only one a b c d e f g   |
| To conclude:   |   |
| AV31   | Do you have any further comments on the implementation of the Letter of Intent in 2020?<br>.....<br>None  |

## Appendix 2 List of all participants with priority area

The overview below lists all participants who have been sent the self-report for the years 2017, 2018, 2019 and 2020. It is also indicated which part of the agreement each participant has signed:

**Salt** – Priority area 1: Reduction of salt content in foods and the reduction of salt intake in the population through the Salt partnership.

**Sugar** – Priority area 2: Reduction of added sugar in foods and reduction in the population's intake of added sugar

**Fat** – Priority area 3: Reduction of saturated fat in foods and reduction of the population's intake of saturated fat

**#MerAv (MoreOf)** – Priority area 4: Increase the population's intake of fruit and berries, vegetables, whole grain products and seafood by 20% by 2021

| Participant  | 2017 | 2018 | 2019 | 2020 | Salt | Sugar | Fat | #MerAv (MoreOf) |
|--|------|------|------|------|------|-------|-----|-----------------|
| A. Nilsson & Co AS   | ✓    | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Nestlé   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| AS Pals  | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   |                 |
| Bakehuset AS   | ✓    | ✓    | ✓    | ✓    | ✓    |       |     | ✓               |
| Baker Brun AS  | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     |     | ✓               |
| Bama   | ✓    | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Barilla Norge AS   | ✓    | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Baxt AS <sup>1</sup>                                       | ✓    | ✓    | ✓    | ✓    |      | ✓     |     |                 |
| Berentsen Brygghus AS <sup>1</sup>                         | ✓    | ✓    | ✓    | ✓    |      | ✓     |     |                 |
| Best Stasjon AS  |      | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| BKLF AS  | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| Brynhild Gruppen   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     |     |                 |
| Brødrene Karlsen AS  |      | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Brødrene Raastad   | ✓    | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Cater Mysen AS   | ✓    | ✓    | ✓    | ✓    |      |       |     | ✓               |
| Cernova/Mesterbakeren AS/<br>Nærbakst <sup>2</sup>         | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| Circle K Norge AS  |      | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| Coca Cola <sup>1</sup>                                     | ✓    | ✓    | ✓    | ✓    |      | ✓     |     |                 |
| Coop   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| COOR Service Management AS                                 |      |      | ✓    | ✓    | ✓    | ✓     | ✓   | ✓               |
| Den Stolte Hane AS   | ✓    | ✓    | ✓    | ✓    | ✓    |       |     |                 |
| Det Glutenfrie Verksted v/Nordic<br>Refreshment Company AS |      | ✓    | ✓    | ✓    |      | ✓     |     | ✓               |
| Diplom-Is AS   | ✓    | ✓    | ✓    | ✓    |      | ✓     | ✓   |                 |
| Domstein Sjømat AS   | ✓    | ✓    | ✓    | ✓    | ✓    |       |     | ✓               |
| Duga AS  | ✓    | ✓    | ✓    | ✓    | ✓    |       |     | ✓               |
| Engrosfrukt AS   |      | ✓    | ✓    | ✓    |      |       |     | ✓               |

| Participant  | 2017 | 2018 | 2019 | 2020 | Salt           | Sugar | Fat | #MerAv<br>(MoreOf) |
|--|------|------|------|------|----------------|-------|-----|--------------------|
| Eugen Johansen AS  | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Fatland Jæren AS   | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   |                    |
| Findus Norge AS  | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   | ✓                  |
| Finstad Gård Engros AS   | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Fjordland AS   | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Gartnerhallen AS   | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Germann Vervik efit AS   | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| GO2Grill Patricias Gatekjøkken   |      |      |      | ✓    | ✓              | ✓     |     | ✓                  |
| Grans Bryggeri AS  | ✓    | ✓    | ✓    | ✓    |                | ✓     |     |                    |
| Grilstad   | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   |                    |
| H. A. Brun AS  | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Hansa Borg Bryggerier AS <sup>1</sup>  | ✓    | ✓    | ✓    | ✓    |                | ✓     |     |                    |
| Ministry of Health and Care Services <sup>3</sup>  | ✓    | ✓    | ✓    | ✓    |                |       |     |                    |
| Hennig Olsen Is  | ✓    | ✓    | ✓    | ✓    |                | ✓     | ✓   |                    |
| Hoff SA  | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   | ✓                  |
| Holmens AS   | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   | ✓                  |
| Huseby Gård  | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Ingebrigtsen kjøtt AS <sup>4</sup>   | ✓    | ✓    |      |      | x <sup>7</sup> |       | x   |                    |
| Insula AS  | ✓    | ✓    | ✓    | ✓    | ✓              |       |     | ✓                  |
| Interfrukt AS  | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| ISS Facility Services AS   |      | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| JÆDER Ådne Espeland AS   | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   | ✓                  |
| Kavli Norge AS: O. Kavli AS & Q-meieriene <sup>2</sup>   | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| King Oscar AS/Thai Union   | ✓    | ✓    | ✓    | ✓    |                | ✓     |     | ✓                  |
| Kolonial.no  | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Lantmännen Unibake   | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     |     | ✓                  |
| LERUM AS <sup>1</sup>  | ✓    | ✓    | ✓    | ✓    |                | ✓     |     |                    |
| Lerøy Seafood  | ✓    | ✓    | ✓    | ✓    | ✓              |       |     | ✓                  |
| Lunde Gård engros AS   | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| MAARUD AS  | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   |                    |
| Macks Ølbryggeri AS <sup>1</sup>   | ✓    | ✓    | ✓    | ✓    |                | ✓     |     |                    |
| Matbørsen AS   | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   | ✓                  |
| Meum Frukt & Grønt AS  | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Mills  | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   |                    |
| Mondelez Norge AS  | ✓    | ✓    | ✓    | ✓    | ✓              |       | ✓   |                    |
| NHO Mat og Drikke (FoodDrinkNorway)  | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| NHO Reiseliv (The Norwegian Hospitality Association)   |      | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| NHO Service og Handel (Norwegian Federation of Service Industries and Retail Trade)                    | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Norfesh AS   | ✓    | ✓    | ✓    | ✓    |                |       |     | ✓                  |
| Norges frukt- og grønnsaksgrøstisters Forbund (Norwegian Fruit and Vegetable Wholesalers' Association) | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| NorgesGruppen  | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| NorgesGruppen Servicehandel AS   |      | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Norgesmøllene AS   | ✓    | ✓    | ✓    | ✓    | ✓              | ✓     | ✓   | ✓                  |
| Norrek Dypfrys AS  | ✓    | ✓    | ✓    | ✓    |                |       | ✓   | ✓                  |

| Participant  | 2017                       | 2018                       | 2019      | 2020      | Salt                  | Sugar                 | Fat                   | #MerAv<br>(MoreOf)    |
|--|----------------------------|----------------------------|-----------|-----------|-----------------------|-----------------------|-----------------------|-----------------------|
| Nortura  | ✓                          | ✓                          | ✓         | ✓         | ✓                     |                       | ✓                     |                       |
| Odd Langdalen frukt og engros AS                       | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Orkla  | ✓                          | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Pelagia AS   | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Red Bull <sup>1</sup>                                  | ✓                          | ✓                          | ✓         | ✓         |                       | ✓                     |                       |                       |
| Rema   | ✓                          | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Ringnes AS <sup>1</sup>                                | ✓                          | ✓                          | ✓         | ✓         |                       | ✓                     |                       |                       |
| Rolf Olsen Engros AS                                   | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Salatmestern AS  | ✓                          | ✓                          | ✓         | ✓         | ✓                     |                       |                       |                       |
| Salmon Brands AS                                       | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Scandic Hotels AS                                      |                            | ✓                          | ✓         | ✓         | ✓                     |                       | ✓                     | ✓                     |
| Scandza: Synnøve Finden AS/Finsbråten AS/Leiv Vidar AS | ✓                          | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Servicegrossistene AS                                  |                            | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Sjømat Norge   | ✓                          | ✓                          | ✓         | ✓         | ✓                     |                       |                       | ✓                     |
| Slåtto Marketing AS                                    |                            |                            |           | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| ST1 Norge AS   |                            | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Svanøy Røykeri AS                                      | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| T.L. Måkestad AS                                       | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| Tine   | ✓                          | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     |                       |
| Toma Facility Services AS                              |                            |                            | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Toma Mat AS  | ✓                          | ✓                          | ✓         | ✓         | ✓                     |                       | ✓                     |                       |
| Tor Sevaldsen Produksjon AS <sup>4</sup>               | ✓                          |                            |           |           | X <sup>7</sup>        | x                     | x                     | x                     |
| Umoe Restaurants AS                                    |                            | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| United Bakeries  | ✓                          | ✓                          | ✓         | ✓         | ✓                     |                       | ✓                     | ✓                     |
| Virke (the Enterprise Federation of Norway)            | ✓                          | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Virke KBS  |                            | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| YX Norge AS  |                            | ✓                          | ✓         | ✓         | ✓                     | ✓                     | ✓                     | ✓                     |
| Økern Engros AS  | ✓                          | ✓                          | ✓         | ✓         |                       |                       |                       | ✓                     |
| <b>Total</b>   | <b>80 (85<sup>5</sup>)</b> | <b>93 (97<sup>5</sup>)</b> | <b>94</b> | <b>96</b> | <b>58<sup>5</sup></b> | <b>46<sup>6</sup></b> | <b>46<sup>6</sup></b> | <b>72<sup>6</sup></b> |

<sup>1</sup>Participants who have only signed Priority area 2: Reduction of added sugar. These are not included in any of the analyses in the annual reports 2017–2019

<sup>2</sup>Participants who have chosen to respond jointly: **Cerenova** also responds for Mesterbakeren, Norgesmøllene and Nærbakst AS; **Kavli** respond for O. Kavli og Q-meieriene, **Scandza** respond on behalf of Synnøve Finden, Leiv Vidar and AS and Finsbråten AS

<sup>3</sup>The Ministry of Health and Care Services has signed all priority areas, but for them it is not relevant to respond to the self-report as their role differs from that of the other participants. This is not captured by the questionnaire. They are therefore excluded from the total.

<sup>4</sup>No longer in the agreement - went bankrupt in October 2019

<sup>5</sup>The totals deviate somewhat from previous years' reporting, primarily because three participants have chosen to respond as one in 2019. In addition, the Ministry of Health and Care Services (HOD) has been excluded from the total. In 2020, another participant responded on behalf of three who have previously been counted as one

<sup>6</sup>The figures for each individual priority area apply for 2020

<sup>7</sup>x indicates which priority areas the participant had signed when they took part but is not part of the 2020 reporting.



## Partnership for a healthier diet

In December 2016, the food industry and the Norwegian Ministry of Health and Care Services signed the Letter of intent for facilitating a healthier diet. The goal is to achieve a more comprehensive and overall collaboration between the health authorities and the food industry in order to make it easier for the consumer to make healthier choices.

Fafo is commissioned by the Directorate of Health to evaluate the agreement. The evaluation includes an annual self-report from the parties who have signed the agreement. This paper is the 2020 annual report from the project.



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