

Food reformulation and product innovation

POSITION PAPER



The European savoury snacks sector has been proactively reformulating products for decades, reducing salt, saturated fat, and total fat while preserving taste and safety. Manufacturers continually invest millions of Euros into the reformulation of existing and development of new products, ingredients and manufacturing methods.

These advances are underpinned by continuous innovation in food processing technologies, which not only enable reformulation but also improve food safety, extend shelf life, and reduce food waste.

1 Demonstrable progress and impact

The European savoury snacks industry has a longstanding commitment and a track record of successful reformulation programmes. Committed to act, ESA members are supportive of a strengthened approach to better and smarter regulation at EU level in which multi-stakeholder actions and self regulation come in useful.

SALT REDUCTION






For certain savoury snacks, salt is applied at the surface of the product, creating a strong initial salty perception due to direct and immediate contact with the palate. In contrast, many everyday foods may contain higher absolute salt levels, but the taste is often less pronounced as salt is spread throughout the food matrix.

In fact, according to the European Food Safety Agency (EFSA)¹ and the European Commission², the main food groups responsible for salt intake

in Europe are bread, meat and meat products, as well as cheese and dairy products

However, savoury snack manufacturers have responded quickly to changing consumer preferences with respect to salt and many ranges of lower-salt and no-salt products are now available; allowing consumers to make the choices best suited to their individual lifestyles.

Below are some concrete results across Europe:

-  **UK** - Minus 56% in potato crisps (1990-2025)³
-  **France** - Between 2013 and 2021, 6 of the 18 families of savoury snacks showed a significant decrease in their average weighted salt content ranging from -7% to -44%, depending on the family⁴
-  **Spain** - Minus 13.8% in potato crisps (2015-2020)⁵
-  **Italy** - Minus 19% in potato crisps (2010-2017)⁶
-  **The Netherlands** - 74% of products meeting national reformulation agreement by 2018⁷

¹ <https://efsa.onlinelibrary.wiley.com/doi/10.2903/j.efsa.2019.5778>

² https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/dietary-salt/sodium_en

³ Comparison of SWA figures for SNACMA Member Companies 2024/25 and McCance and Widdowson's, The Composition of Food, 1991

⁴ https://www.oqali.fr/media/2025/06/OQALI_2025_Rapport_evolution_Aperitifs-a-croquer.pdf

⁵ https://www.boe.es/diario_boe/txt.php?id=BOE-A-2019-3634

⁶ https://www.salute.gov.it/imgs/C_17_pubblicazioni_2426_ulterioriallegati_ulterioreallegato_0_alleg.pdf

⁷ <https://www.rivm.nl/bibliotheek/rapporten/2019-0032.pdf>

SATURATED FAT REDUCTION

- Adoption of high-oleic sunflower and rapeseed oils, and new baking/ frying technologies (air-popped and oven-baked snacks), have enabled manufacturers to drop saturated fat by up to 70% in certain final products⁸.
- In France for instance, between 2013 and 2021, 10 of the 18 families of savoury snacks showed a significant decrease in their average weighted saturated fat content ranging from -11% to -72%, depending on the family⁹.

While producers continue to invest heavily in reformulation, it is worth remembering that savoury snacks is only a minor contributor to overall salt and saturated fat intakes in European diets. Overall, across the European Union, the average intake of salt and saturated fat through the consumption of savoury snacks is very low, ranging between 2 to 4% of overall intake, depending on the nutrient and the country¹⁰.

Beyond the reduction of certain nutrients, manufacturers also add value to their products. They are increasingly introducing pulses, grains, and protein- or fibre-rich ingredients to improve nutritional content, expanding consumer choice with "better-for-you" alternatives like lentils- and pulsed-based snacks. This shift also supports the transition towards more sustainable food systems, as these ingredients typically have a lower environmental footprint and contribute to more diversified and resilient supply chains.

Thanks to advanced processing technologies, these new ingredients can be used efficiently, enabling stable and tasty formulations that meet evolving consumer demand for more sustainable, plant-based, and convenient foods.

Looking forward, plant-based, high-protein, and high-fibre innovations will play an ongoing role in driving growth across the sector.

2 Challenges linked to reformulation and product innovation

ESA recognises that reformulation is not a silver bullet. Technological and sensory limits are real. Beyond certain thresholds, reducing salt or fat can make products technologically unviable or organoleptically unacceptable (e.g. baked/ extruded products losing texture or flavour). Some products have already reached the limits of what can be realistically achieved.

Change must be gradual to preserve consumer acceptance. Reformulated products take time to develop, test, and gain market traction. Consumer perception and taste remain decisive for long-term adoption.

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⁸ Data provided by ESA members. Many reduced-fat products are available in stores in Europe.

⁹ https://www.oqail.fr/media/2025/06/OQAIL_2025_Rapport_evolution_Aperitifs-a-croquer.pdf

¹⁰ Based on figures available with Euromonitor International Nutrition Passport

Below are some structural and regulatory barriers to reformulation:

- Food safety and quality assurance => Reformulation efforts must always preserve microbiological safety, texture, and shelf life. Processing innovation is key to maintaining these standards.
- Technological feasibility => For instance minimum quantity of salt is needed for expansion processes of certain products.
- Legal frameworks => For instance, restrictions on communicating gradual nutrient changes to consumers (comparative claims rule under the EU Nutrition and Health Claims Regulation (EC) No 1924/2006) stifle innovation and limit consumer awareness.

There are 3 important elements to track and monitor reformulation progress at sector level:

- 1 Evidence-based reporting:**
ESA uses verified data from national monitoring frameworks (e.g. OQALI France, Public Health England, WHO/ Europe). Progress is demonstrated through multi-year nutrient reductions and cross-country voluntary agreements.
- 2 Using realistic metrics to track progress:**
The Sales Weighted Average (SWA) approach is one of the most effective ways to capture real-world market impact and ensure credible tracking of nutrient reduction at consumer level.
- 3 Acknowledgement of cumulative effort:**
ESA believes it is key to factor past achievements when setting new targets, suggesting a benchmark period of 5–10 years minimum to reflect progress already made.

3 Tracking progress on reformulation

ESA believes that different strategies can prove effective in stimulating reformulation and driving food innovation forward. As demonstrated above, self- and co-regulation approaches are efficient tools to incentivise reformulation and product innovation since it usually allows for the setting of realistic objectives (both in terms of nutrient reduction and timing), considering manufacturers constraints, especially for Small and Medium Enterprises (SMEs).

As far as the savoury snacks sector is concerned, the continuous monitoring, the participation to voluntary programmes at EU and national levels as well as a transparent use of public data demonstrate a solid reformulation track record.

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4 Clear ambition on reformulation and product innovation

ESA supports the ambition to make food systems healthier and more sustainable, advocating for multi-stakeholder collaboration and “better and smarter” regulation.

Our policy recommendations for effective reformulation includes:

- 1 Transparent dialogue with all sectors involved
- 2 Avoiding the setting of maximum nutrient limits, which risk stifling innovation and competitiveness, especially for SMEs
- 3 Using robust data and methodology for realistic, balanced targets
- 4 Recognising past achievements
- 5 Accounting for category-specific barriers and the actual dietary contribution of products
- 6 Allowing adequate transition periods for industry adaptation

ESA AMBITION STATEMENT:

The European savoury snacks sector will continue investing in innovation and reformulation to deliver enjoyable, high-quality snacks with improved nutrition - but seeks a fair, evidence-based policy environment that sustains competitiveness and consumer trust.

ESA believes that innovation in processing is an enabler of both health and sustainability goals. Advanced technologies can lower the environmental footprint of manufacturing, support circularity, and improve resource efficiency. At the same time, they empower companies to offer products that are safer, more convenient, and affordable to a wide range of consumers, contributing to a more resilient food system overall.

5 Conclusion

The European savoury snacks sector:

- Is a minor contributor to overall salt and saturated fat intakes in European diets
- Has delivered measurable nutritional improvements across Europe
- Acknowledges the scientific and practical limits of reformulation
- Tracks progress transparently and calls for realistic, data-driven targets
- Maintains a clear forward-looking ambition to continue innovating
- Recognises the positive contribution of food processing to ensure safety, reduce waste, support sustainable sourcing, and expand consumer access to affordable, nutritious, and enjoyable snack options.

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