



Grains & Legumes Nutrition Council Ltd (GLNC)

ANNUAL REVIEW 2019 - 2020

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91%

Of Contributors believe that GLNC is a relevant partner for them and their organisation

100%

Of Contributors are supportive of GLNCs continuing four pillar strategy



million

Consumers reached via GLNC campaigns



Increase in website visits on FY19



New registered products on the whole grain database



Increase in GLNC e-news subscribers



Views and downloads of 6 GLNC published papers



million

Consumers reached via social media



New followers on Instagram

STRATEGIC PLAN: 2017 - 2019

ENJOY
GRAIN
FOODS
3-4 TIMES
A DAY,
MAKING AT
LEAST HALF
WHOLE
GRAIN OR
HIGH FIBRE

ENJOY
1/2 CUP
LEGUMES
AT LEAST
2-3 TIMES
EACH WEEK

VISION

GLNC is the independent authority on the nutrition and health benefits of grains and legumes

MISSION

GLNC promotes the role of grains and legumes as part of a balanced diet through evidence-based information, while supporting the industry to benefit all Australians

VALUES

INTEGRITY: ensure an ethical, scientific and evidence-based approach

TRUST: build trust with stakeholders and the community with the information we provide

CREDIBILITY: maintain independence and standing amongst stakeholders and the community

STRATEGIC PRIORITIES

GLNC operates through the support of the Australian Export Grains Innovation Centre (AEGIC) and Contributors to the Council, with a focus on four key pillars that form the basis for the strategic plan: Evidence, Market Insights, Industry Engagement and Community Engagement

EVIDENCE

GLNC maintains evidence-based scientific database expertise in the role of grains and legumes in a healthy, balanced diet to reduce risk of chronic disease. GLNC tracks existing and emerging scientific research and reviews population studies to underpin engagement and communication messages.

MARKET INSIGHTS

GLNC identifies and monitors market issues and tracks opportunities related to health and nutrition to support the grains industry in producing foods that will reduce risk of chronic disease. GLNC tracks changes in the food supply, consumer attitudes and behaviour as well as regulations, policy and public health recommendations related to grains and legumes.

INDUSTRY ENGAGEMENT

GLNC is a key strategic partner for industry, providing expert advice and insights to support the development and promotion of healthier grain and legume foods. Stakeholders across the supply chain include growers, traders, handlers, processors, regulators, manufacturers and retailers

COMMUNITY ENGAGEMENT

GLNC actively engages with key influencers of consumer attitudes and behaviours to raise awareness of the role of grains and legumes in a healthy, balanced diet and reduce risk of chronic disease. Influencers include government, key opinion leaders, not-for-profit organisations, healthcare professionals, retailers, the media and ultimately consumers.

CONTRIBUTORS

GLNC is a not-for-profit company limited by guarantee and a recognised health promotion charity.

GLNC is supported by Contributors from the grains and legumes value chain including growers, research organisations, food manufacturers and industry associations. Representing the Australian and New Zealand industry, GLNC Contributors are part of a powerful, collective voice advocating the nutrition and health benefits of grains and legumes in Australian diets.

CONTRIBUTORS RANKED THE AUDITS, CATEGORY REPORTS & GLNC WEBSITE AS HIGH VALUE RESOURCES



2019 – 2020 PROJECT INVESTMENTS

EVIDENCE



Whole Grains: Consumer Understanding

With the University of Wollongong (UoW), GLNC surveyed 735 individuals on their understanding and consumption of whole grains. Over half of all participants were unable to identify either a recommended grain serve amount (62%) or size of whole grain serves (61%). This is an important finding to consider, as without sufficient knowledge on whole grain recommendations the success of positive health behaviours is limited. Findings from this study highlight the need for further education on whole grain health benefits, how to identify whole grains and whole grain foods and practical ways for individuals to incorporate them into their current lifestyle. Shara Foster, from the University of Wollongong (UoW) presented this data for GLNC Contributors and the work has since been published in the high ranking journal, *Nutrients*.

Whole Grains: Dietary Intake

High quality dietary intake data is fundamental in understanding the relationship between food, diet and health. Determining intake for a population is complicated and infrequent, meaning independent groups often complete their own dietary assessments. Whole grains are linked to numerous health benefits, however, dietary assessment methods used to determine whole grain intake are associated with inaccurate estimations, as uniform guidelines don't exist. This study aimed to review methods of determining whole grain intake and develop recommendations of best practice for collecting group / population whole grain intake. Katherine Russell from UoW presented her findings to Contributors.

Peer Review Publications

The GLNC team have published six peer reviewed papers in FY20, with all publications reaching over 17,000 downloads as of August 2020. This academic content proved to be a valuable tool to gain traction in the media, raising the Council's reputation globally. See the publications at the end of this report for the full list. Academic collaborations now include the University of Melbourne, Curtin University, Monash University, Sydney University, University of Wollongong, University of Newcastle and the University of Melbourne.

Advocacy

GLNC maintained an active role in advocacy in FY20, completing submissions on the 5 year Health Star Rating review. GLNC continues to maintain contact with FSANZ in relation to grain and legume food categories and The Code. The Systematic Literature review and meta analyses for a potential Health Claim for Whole Grain and Coronary Heart Disease has now been finalised and is awaiting publication. GLNC is represented on the local working party for the Health Grain Forum's Whole Grain Definition and on the international committee for Whole Grain Promotions / Public-Private Partnerships, via AEGIC for the whole grain definition and as part of the International Board, providing insights to the direction of whole grain globally.

MARKET INSIGHTS



Grain & Legume Audits

GLNC completed several audits during FY2, covering breads (764 products), flour and bread mixes (135 products), grain-based snacks (195 products) and peanut butter (81 products).

Two clear messages emerged from these audits:

- Wholemeal wheat flour contains 2.8 times more dietary fibre than white flour
- The number of grain and legume milk products have grown by 58% in just two years

GLNC has additionally committed to regularly maintaining updates on the plant-based audit with an update due in FY21.

INDUSTRY ENGAGEMENT



The Code of Practice

GLNC plays a regulatory role through The Code of Practice for Whole Grain Ingredient Content Claims, registering products as a service provided to encourage engagement with the Code. Additionally the Council tracks the changing whole grain market, identifying trends and innovation.

As of June 30 2020 there were 37 registered users and 842 registered products in Australia and New Zealand - a 16% increase in registered products compared to the previous year. Forty three percent of newly registered products came from the grain foods category (e.g. pasta, rice, other grains), which exceeded GLNCs target for new products in this group.

Reputational Tracking Study

Conducted with key stakeholders in February 2020, the GLNC reputational tracking study encouragingly found that Contributors are satisfied with their membership. This study is conducted annually and is just one of the many ways that GLNC reviews quality and performance measures.

Analysis showed that 100% of Contributors were supportive of the continuing four pillar strategy, with 91% also believing that GLNC is a relevant partner for them and their organisation. Additionally, 82% would recommend membership of GLNC to their colleagues in other organisations.

Through regular meetings and electronic communications, important relationships with Contributors have been maintained. Open rates on internal communications have continued to be tracked for a clearer understanding of preference.

COMMUNITY ENGAGEMENT



Bring Back the Sandwich

GLNCs third Bring Back the Sandwich campaign was again held in collaboration with Nutrition Australia and the Healthy Kids Association. Aimed at increasing parents' ease when packing lunches for the back-to-school week, this campaign has proved yet again to be extremely effective and generated reach of over 284,000 - up 141% on FY19.



Whole Grain Week (WGW)

Following the success of GLNCs inaugural Whole Grain Week (WGW) in 2018, WGW activities in 2020 built on these outcomes. Key messages focused on the importance of swapping refined for whole grain options and increasing whole grain variety to benefit from a range of nutrients. A Community Service Announcement broadcast on major Australian TV channels, radio and online reached over 4 million consumers with more than 600 individual views of the short videos. With support from a number of significant industry players, Contributors and key online influencers, WGW 2020 proved yet again to be GLNCs most successful campaign with an overall reach of over 9 million Australia-wide.

Throughout the year the Council also joined activities for Global Pulses Day, Dietitians Day, Bowel Cancer Awareness Month, Meat Free Week, Men's Health Week, Gut Health Day & more.



CHAIR'S ADDRESS

On behalf of the GLNC Board and Management I am pleased to provide this overview of GLNC activity for the 2019-2020 year.

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The opportunity to leverage the “plant-based” trend has been taken up by the GLNC team. Investigating plant-based meat alternatives early in the financial year has paid off in terms of research outputs, presentations and media. While there have been changes in the team, with Felicity Curtain moving on and new graduate Jaimee Hughes joining, the team has not missed a beat, continuing their successful campaign, Bring Back the Sandwich, now in its third year, alongside Global Pulses Day. The major campaign, Whole Grain Week was celebrated with an objective

to reach a broader audience this year via Community Service Announcements and radio advertising encouraging swapping to whole grains.

Links with AEGIC have strengthened with the publication of a paper comparing Red and White Wheat and the applicability to whole grain foods, a most useful resource for the AEGIC team promoting Australian grain in the Asian Market. Whole grain and health continues as a strategic link between the businesses, seeking to further increase the value proposition for Australian grain. GLNC continues to collaborate with the AEGIC team on projects, in particular the Whole Grain Milling Authenticity and the Whole Grain Food definition.

I would like to thank the Board, AEGIC and Industry Contributors for their continued support through challenging times for the grain industry. General Manager, Sara Grafenauer and the GLNC team have continuously innovated throughout the year, exceeding targets in communicating the benefits of grains and legumes while supporting industry.

On behalf of the Board, we look forward to an equally successful FY21.

Terry Enright, Chair



GENERAL MANAGER'S YEAR IN REVIEW



The GLNC strategy clearly focuses on four pillars, Evidence, Market Insights, Community Engagement and Industry Engagement.

In FY20 we concentrated more than ever on bringing these four pillars to life. Publishing our own research was key to this effort, driving media attention and engagement with healthcare professionals. Access to dynamic market data from reputable sources like MINTEL was also key to producing insightful category reports and presentations and anticipating market trends. Alongside other researchers in our network, we published ten manuscripts in international nutrition journals; supporting new dietary guidelines and understanding consumer choices.

Our publications also supported advocacy efforts relating to Heath Star Rating and promoted legumes and the specific benefits of white wheat. Downloads have far exceeded what would normally be possible for reports on the GLNC website, with a total of over 17,000 across our portfolio of 13 papers (at 20 August 2020). Conference presentations at national and international conferences were unfortunately affected by COVID 19, with our six year impact assessment of the Code of Practice for Whole Grain Ingredient Content Claims (The Code) due to be presented in New Zealand at the 16th ICC Cereal and Bread Conference, now delayed until 2021. Research with the University of Wollongong and University of Sydney continue to offer industry-relevant projects.

We renovated the way we report our Market Insights in FY20, moving from two large category reports, to more specific and focused reports based on sub-categories – the first reports covering bread and flour. All grain and legume audits conducted in FY20 were carried out with a view to publishing outcomes and building reputation as an industry leader in this space.

During Whole Grain Week in June we took the opportunity to reach a broader and very different audience via Community Service Announcements on free-to-air TV and online, resulting in an increase of 90% (media) and 83% (social) on 2019 outcomes. Our mini campaigns continue to be well supported on social media - Bring Back the Sandwich reached over 400,000 in collaboration with other industry organisations.

Advocacy remained at the forefront in FY20 with further input to the Health Star Rating consultation, where GLNC played a major role in supporting industry and providing necessary evidence to help validate changes to the system. Despite these efforts, whole grain has not been included in the algorithm, but two published papers will help support the next round of revisions. The Rapid Integrated Fibre Method is with FSANZ for assessment and we will continue to work with the regulator in FY21 to finalise this major piece of work.

Collaboration with AEGIC was strengthened in FY20 with a key visit to Indonesia, influencing organisations to expand current regulations for whole grain.

GLNC plays an important role in explaining the importance of whole grain, covering nutrition, health and the potential market advantages of milling with the whole grain in Asian markets, with plans to build on this in FY21.

Engagement with the Code is increasing, with 71% growth in products in the seven years since launch. As of 30 June 2020, there were 37 Registered Users and 842 Registered Products in Australia and New Zealand, a 16% increase in registered products compared to the previous year, demonstrating strong uptake by industry. GLNC's role in monitoring this growing area of the food supply can attest to the consistency and compliance of on-pack communication regarding whole grain content.

I'd like to acknowledge my team's perseverance and continued focus and look forward to another year, with a view to greater collaboration across the entire food industry.

Sara Grafenauer, General Manager

THE YEAR AHEAD

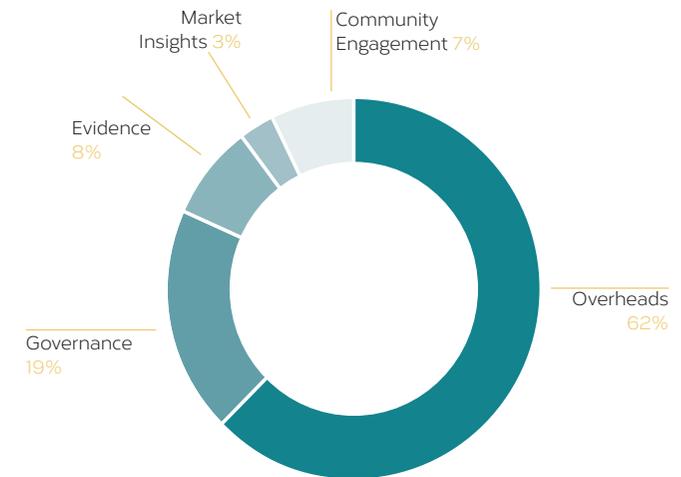
Although uncertainty regarding funding remains an issue for the Council into FY21, a two-year commitment has been obtained with AEGIC, the Foundation Contributor. Accordingly, the strategic plan will again be extended, with revisions to the operational plan and projects.

Publications from assessment of grain and legume foods from audits have proven a viable method of attracting media. For example, there has been significant media generated quoting both the legume and plant-based meat alternatives papers with over 500,000 reach. The communication strategy for FY21 will focus on the plant protein opportunity, which allows both grain and legume foods to be highlighted with consumers, including the benefits like fibre, gut health and the tangible benefits for day-to-day health.

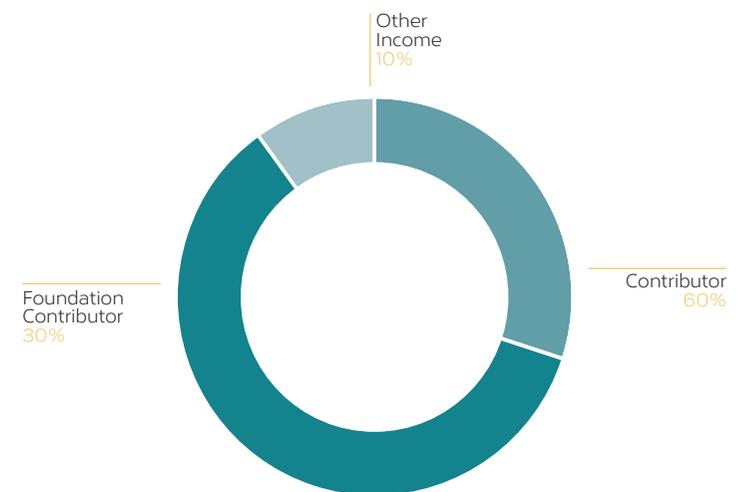
From research conducted in FY20, we will continue to highlight whole grain choices with consumers, enhancing understanding through a new certification initiative for Contributors to GLNC. Our objective is to also propose greater emphasis on whole grains and high fibre foods in the wording of the next Australian Dietary Guidelines (ADGs) and gain greater focus on legumes, perhaps through suggesting they be categorised separately to meats and vegetables. Preparation will continue in this area so GLNC will be positioned to provide a comprehensive submission.

In FY21 GLNC will continue working with AEGIC in Asia and with millers regarding whole grain milling practices but also provide more inspiration via innovative products in the Asian market through our access to MINTEL data. Our international network is growing through the Health Grain Forum on Public-Private Partnerships.

EXPENDITURE SUMMARY



INCOME SUMMARY FY19



GLNC MANAGEMENT



Sara Grafenauer

GENERAL MANAGER

Sara was appointed General Manager of GLNC in May 2017. Sara is an AdvAPD and author with experience in health, food industry (consulting and brand management) and tertiary education. Her PhD research focused on dietary patterns and dietary change in weight loss. She is a Fellow of the University of Wollongong providing lectures and student supervision. Her more recent research leverages social media in large scale health promotion and as a research tool. She has additional qualifications in Communications and Public Relations and significant work history leading marketing and communications for the Dietitians Association of Australia.



Alexandra Locke

MARKETING & COMMUNICATIONS MANAGER

Alexandra was appointed Marketing & Communications Manager at GLNC in July 2016 and holds a Bachelor of Science in Food Marketing Management and a Postgraduate Certificate in Digital Communications. With experience working in both the UK and Australia across the FMCG & Retail industries in Marketing, Communications and Product Development, Alexandra has cultivated specific interests in analysing global market trends and creating engaging content for a variety of stakeholder audiences.



Jaimee Hughes

NUTRITION MANAGER

Jaimee commenced as Nutrition Manager in January 2020 with Felicity Curtain moving on. Jaimee has an interest in food standards and regulation and has recently conducted research related to nutrition and health claims on food product labelling. Jaimee holds a Bachelor of Nutrition and Dietetics from the University of Wollongong. As Code Manager, Jaimee oversees the management and growth of the Code of Practice for Whole Grain Ingredient Content Claims.

GLNC BOARD



Terry Enright
CHAIR

Terry was formerly a grains and livestock producer in Western Australia and was appointed Chair of GLNC in October 2016. He served as Chair of the Grains Research and Development Corporation (GRDC) for five years and Chairman of the Australian Export Grains Innovation Centre for six years. He has served on a number of Agriculture related positions including commissioner of the Export Wheat Commission and a member of the standing committee on National Research priorities. Terry served as an independent Director and Chair of the Australian Livestock Export Corporation (Livecorp), Director of the Crawford Fund for 10 years, and was awarded an Honorary Doctorate of Science in Agriculture, from the University of Western Australia.



John Lloyd
DIRECTOR

John Lloyd is the former CEO of Horticulture Innovation Australia/HAL leading both organisations over a nine year period of significant growth, change and transition. John joined the GLNC Board in November 2018 and is current director of Fisheries Research and Development Corporation, Agribusiness Australia and Menari Business Solutions Pty Ltd. John's career has spanned most parts of the Australian agribusiness sector with senior leadership positions including Managing Director Case IH/New Holland ANZ; General Manager Commercial Incitec Pivot; and General Manager Merchandise Wesfarmers Dalgety. More recently John has lead a significant restructure of the research corporation for the \$10 Billion horticulture sector. John has a Bachelor of Applied Science from the University of NSW as well as an MBA from Macquarie University.



Robyn Murray
DIRECTOR

Robyn was appointed to the Board in January 2012. Robyn has 30 years' experience in the food industry, leading R&D programs for George Weston Foods, Campbell Arnott's and Kellogg's. Robyn has had a particular focus in Innovation, Product Development, and Nutrition, locally and globally. She holds a Bachelor of Science in Food Technology and a Masters of Commerce in Marketing from the University of New South Wales, Sydney..



Emma Walczak, LLB, B.ICT, FCG, FGIA
COMPANY SECRETARY

Emma has had significant experience as a commercial lawyer and company secretary for over 12 years, advising companies on mergers and acquisitions, initial public offerings, private equity raising and providing commercial contracts advice.

Emma is the principal of Trinitas Legal, her own law practice, where she provides commercial law advice and company secretarial services for a number of businesses in varying industries.



Report prepared by Dr Sara Grafenauer, General Manager of GLNC.

A copy of this document can be found on the Grains & Legumes Nutrition Council website: glnc.org.au

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Publications

- Bielefeld, D.; Grafenauer, S.; Rangan, A. The Effects of Legume Consumption on Markers of Glycaemic Control in Individuals with and without Diabetes Mellitus: A Systematic Literature Review of Randomised Controlled Trials. *Nutrients* 2020, 12, 2123.
- Foster, S.; Beck, E.; Hughes, J.; Grafenauer, S. Whole Grains and Consumer Understanding: Investigating Consumers' Identification, Knowledge and Attitudes to Whole Grains. *Nutrients* 2020, 12, 2170.
- Ang, K.; Bourgy, C.; Fenton, H.; Regina, A.; Newberry, M.; Diepeveen, D.; Lafandra, D.; Grafenauer, S.; Hunt, W.; Solah, V. Noodles Made from High Amylose Wheat Flour Attenuate Postprandial Glycaemia in Healthy Adults. *Nutrients* 2020, 12, 2171.
- Hughes, J.; Vaiciurgis, V.; Grafenauer, S. Flour for Home Baking: A Cross-Sectional Analysis of Supermarket Products Emphasising the Whole Grain Opportunity. *Nutrients* 2020, 12, 2058.
- Zhang, Y.Y.; Hughes, J.; Grafenauer, S. Got Mylk? The Emerging Role of Australian Plant-Based Milk Alternatives as a Cow's Milk Substitute. *Nutrients* 2020, 12, 1254.
- Curtain, F. & Grafenauer, S. Historical and Global Perspectives of Grain and Whole Grain within Dietary Guidelines. *Cereal Foods World*.
- Grafenauer, S.; Miglioretto, C.; Solah, V.; Curtain, F. Review of the Sensory and Physico-Chemical Properties of Red and White Wheat: Which Makes the Best Whole Grain? *Foods* 2020, 9, 136. (Feature paper)
- Curtain, F.; Locke, A.; Grafenauer, S. Growing the Business of Whole Grain in the Australian Market: A 6-Year Impact Assessment. *Nutrients* 2020, 12, 313.
- Curtain, F. & Grafenauer, S. Comprehensive nutrition review of grain-based muesli bars in Australia: An audit of supermarket products. *Foods* 2019, 8, (9), 370-1-370-13.
- Curtain, F. & Grafenauer, S. Plant-based meat substitutes in the flexitarian age: An audit of products on supermarket shelves. *Nutrients* 2019, 11, (11), 2603-1-2603-14.

Conference Presentations

- Curtain, F.; Locke, A.; Grafenauer, S. Growing the Business of Whole Grain in the Australian Market: A 6-Year Impact Assessment. 2020 16th ICC, Cereal and Bread Congress, NZ (delayed due to COVID 19)
- Grafenauer, S.; Miglioretto, C.; Solah, V.; Curtain, F. Review of the Sensory and Physico-Chemical Properties of Red and White Wheat: Which Makes the Best Whole Grain? 2020 Poster Presentation, 16th ICC, Cereal and Bread Congress, NZ (delayed due to COVID 19)
- Grafenauer, S. and Locke, A. (2020) Trends in Grain Foods and beyond 2020(with a focus on Bread). Australasian Milling Conference, Gold Coast (delayed due to COVID 19)
- Grafenauer, S., and Curtain, F. Plant Power: Plant Based Meat Substitutes in the Flexitarian age. (2020) GRDC Research Update, Bendigo
- Grafenauer, S., and Curtain, F. Meat substitutes in the flexitarian age: an audit of products on shelf in Australian supermarkets (2019) Nutrition Society Conference, Newcastle.
- Grafenauer, S., and Curtain, F. (2019) Whole Grain diets, Health Star Rating and opportunities for health related promotions of grains. Grains Research Development Corporation, Research Update, Adelaide.
- Grafenauer, S., and Curtain, F. Navigating the snack bar aisle: An audit of grain-based bars in Australian supermarkets (2019) National Dietitians Association Conference, Gold Coast.
- Grafenauer, S. Whole Grain Regulation in Australia. Invited Keynote Speaker CPW Whole Grain event, Indonesia
- Grafenauer, S., and Curtain, F. Why the future needs to be Whole Grain...(2019) Australian Grain Science Conference, Melbourne.
- Grafenauer, S., Locke, A., and Curtain, F. Plant to Plate: whole grain and legume insights. (2019) AISFT Conference, Sydney Conference, Canberra