Grains & Legumes Nutrition Council

Grains & Legumes Nutrition Council Ltd (GLNC)

ANNUAL REVIEW 2020 - 2021

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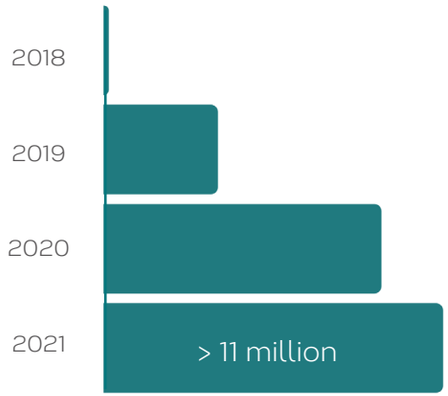
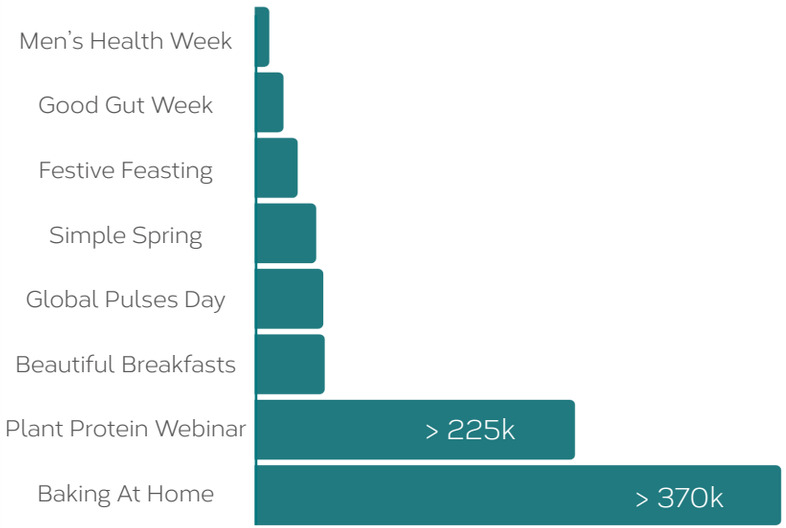
CAMPAIGN PROGRESS

WHOLE GRAIN WEEK 2018-21



FY21 MINI CAMPAIGNS



>13.5 million

Consumers reached via GLNC campaigns

>1k

New registered products on the whole grain database

>1.8k

New followers on Instagram

7

Published papers & >45k views

87% Of Contributors believe that GLNC is a relevant partner for them and their organisation

ENJOY GRAIN FOODS 3-4 TIMES A DAY, CHOOSE 3 WHOLE GRAIN SERVES TO MEET THE 48G DTI

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

STRATEGIC PLAN: 2020 - 2022

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 gains 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 CATEGORY REPORTS, MEDIA RELEASES & HOT TOPICS AS HIGH VALUE RESOURCES

LOOK FOR THE WHOLE GRAIN™

aegic
Australian Export Grains Innovation Centre

GWF / George Weston Foods Limited

cpw
Cereal Partners Worldwide
Nestlé and General Mills

Sanitarium™
The Health Food Company

Arnott's Group

McKENZIE'S
FOR EVERYDAY SINCE 1852

Bakers Delight
We're for real.

KIALLA PURE organics
EST. 1988

the HEALTHY grain™

LAUCKE

wholegrain milling co.

PULSE AUSTRALIA

AUSTRALIAN FOOD & GROCERY COUNCIL

2020 – 2021 PROJECT INVESTMENTS

EVIDENCE

NOVA & Whole Grains:

Together with the University of Wollongong (UoW), GLNC has co-supervised research titled *'Is the classification of ultra-processed foods within NOVA consistent with promotion of whole grain foods in the Australian food system?'*

This work has resulted in a national conference presentation and two publications submitted to high-ranking journals.

Legume Consumption & Dietary Guidelines

A second research project with UoW was also conducted titled *'An exploration of legumes in global food-based dietary guidelines and global legume consumption.'*

This work will be published in the coming year, bringing together a systematic approach to analysing wording for legumes in Dietary Guidelines globally - an important step in helping to formulate GLNC positioning on future dietary guidelines.

Legumes & Glycaemic Control

In FY21, GLNC co-supervised a University of Sydney dietetic student for the first time. This work was titled *'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.'*

The systematic review process is important in building high level evidence, important for the preparation of dietary guidance. This work was published in the tier 1 journal, *Nutrients*.

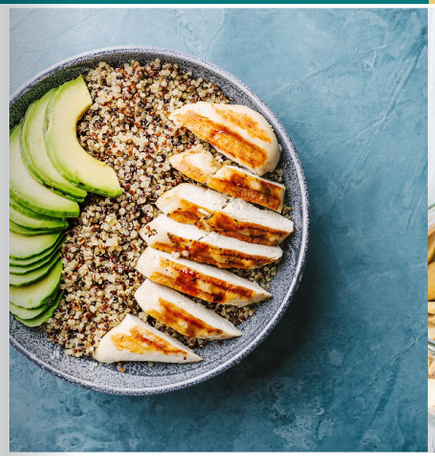
Nutrition Economics - Healthcare Savings

GLNC commissioned and co-published two important manuscripts in FY21, demonstrating the value of prevention of disease through dietary change on the Australian Healthcare system. The first paper published in May was quickly followed by a second paper, promoted over Whole Grain Week and into the new financial year, coinciding with the Dietitians Australia Conference. The concept of nutrition economics is new and was explained effectively through a science animation. More complete outcomes of this work will be reported in FY22.

Publications

The GLNC team have published seven peer reviewed papers in FY21, with all publications now over 43,500 views and 106 citations, proving a valuable tool in gaining traction in the media and raising the Council's reputation globally. Work commissioned in FY20 was also published as the lead review in the *Journal of the Academy of Nutrition and Dietetics*.

See listed publications at the end of this report.



Advocacy

GLNC has maintained an active role in advocacy in FY21, completing submissions regarding The Australian Dietary Guidelines (scoping survey); a submission for the National Preventative Health Strategy (including contribution to the AFGC submission); and involvement in the FSANZ Act review (also via AFGC).

Grain & Legume Audits

GLNC completed audits of breakfast cereals (n=586), legumes (n=615) and maintains an updated listing of plant-based meat alternatives. The legume audit in particular was linked with our focus project on lupin foods, supported by DPIRD and GIWA. Three clear messages emerged from the audits:

- Two thirds of all breakfast cereals are at least a source of whole grain.

- There's been a nine-fold increase in the number of plant-based meat alternatives in Australian supermarkets since 2015.

- Legume-based products have grown 97% in just two years.

The Code of Practice

GLNC plays a unique regulatory role through the Code of Practice, registering products as a service provided to encourage engagement with the Code and to track the market. As of 30 June 2021, there were 48 registered users and 1,017 registered products in Australia and New Zealand - a 21% increase in products compared to FY20.

In FY21 GLNC have registered more manufacturers than the last 3 years combined. The majority were breakfast cereals (43%), followed by breads and whole grain flours.

We look forward to being able to launch the new certified logo as a strategy to attract more business in FY22.

Bring Back the Sandwich

GLNCs second biggest campaign reached over 1 million people in 2021, with over a 300% increase on the FY20 campaign. This campaign is aimed at families, decreasing stress around packing lunches for the back-to-school week and beyond.

This year a key activation included a feature on the back of the Australian and New Zealand Healthy Food Guide print magazines, alongside key industry collaborations to promote messaging.

Whole Grain Week (WGW)

Following the considerable success of Whole Grain Week 2020, the 2021 campaign built on messaging established in 2020 with activations on TV, radio, in-store and online. Key messages focused on the benefits of swapping to whole grain foods. Total reach exceeded 11 million, boosted by a number of collaborations with healthcare professionals and influencers, alongside engagement with key industry stakeholders.

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 and more.

CHAIR'S ADDRESS

On behalf of the GLNC Board and Management I am pleased to provide this overview of GLNC activity for the 2020-2021 year.

The team at GLNC has again built on the success of recent years, focusing on our clear and simple strategic plan and its four pillars: Evidence, Market Insights, Industry Engagement and Community Engagement. Under the Evidence pillar we have presented leading research in nutrition economics, with A$1.4billion savings for Australian healthcare in relation to consumption of whole grains, providing messages that support the grain industry.

Market Insights in the area of plant protein as a strong communication theme are increasingly relevant as both consumers and the industry look to sustainability issues in dietary patterns and the future of food supply. Industry engagement is at an all-time high, led by the role that GLNC plays in facilitating use of whole grain claims by the food industry. The increase in whole grain products and claims globally is mirrored in Australia and is supported by strong research, with further growth expected following the launch of the Whole Grain Certified logo in FY22.

The role that GLNC plays in engaging the community is growing exponentially, with reach of over 11 million from the flagship campaign, Whole Grain Week in mid-June. Using clever strategy built on strong relationships with nutrition professionals and social media connections, GLNC promotes relevant campaign messaging across both grain and legume foods, supporting the industry.

Links with AEGIC have strengthened with nutrition focused presentations embedded in the Asian Market seminar series, the organisations sharing a common goal to improve the food supply using whole grain ingredients. GLNC continues to collaborate with the AEGIC team on projects relating to new product development and the new method for Dietary Fibre analysis.

COVID-19 has generated a focus on food sources, supply chains and nutrition. This is a global development and presents an opportunity for GLNC to engage with our entire value chain from producers to consumers on how Australia can best exploit its natural advantages in food production and processing.

I would like to thank the Board, AEGIC and Industry Contributors for their continued support of GLNC. I also thank General Manager, Sara Grafenauer and the GLNC team for their unique offering showcasing the benefits of grains and legumes. In the face of challenging COVID-19 restrictions their agility and adaptability has greatly benefited GLNC and its members. With your continued support, we look forward to an equally successful FY22 and beyond.

Ron Storey, Chair

GENERAL MANAGER'S YEAR IN REVIEW

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

The last financial year brought rapid change for the Council. We revised our branding to align with our more contemporary look on social media and alongside this, developed a Certified Logo for eligible whole grain Contributor products. The COVID-19 pandemic also forced a change in the way we run campaigns. Fortunately, we were well prepared with a televised Community Service Announcement for Whole Grain Week in June 2021 and have also conducted other multi-location online events together with digital-based campaigns on social media.

Central to our business strategy are the grain and legume food category audits. These are a key resource for contributors, drive peer-reviewed research publications and form the basis of category reports and other presentations for key stakeholder groups. In FY21 our main audit of the breakfast cereal category culminated in a publication which combined data from 2013 to 2020, completing a series of papers in the scientific literature. This research clearly demonstrates the work of the industry in fine-tuning food composition, particularly sugars, sodium and importantly, whole grain.

For the first time we collected comparative audit data from Western Australia to accompany our east coast data on legumes, with a particular focus on lupins in the food supply. The lupin project is co-funded by the Department of Primary Industries and Regional Development and the Grain Industry Association of Western Australia and this work continues into FY22 with a multi-faceted campaign planned for launch in Q1.

With new Dietary Guidelines in development, the Council has been working to support the evidence base for legumes and grains, with two compelling systematic reviews now published. Further research examining global guidelines and the wording used in these guidelines continues. Nutrition economics research is also supportive and points to the value of preventative dietary strategies with a focus on whole grains and disease.

I'd like to acknowledge the GLNC team's continued focus over FY21 and look forward to another collaborative year with industry.

Sara Grafenauer, General Manager

THE YEAR AHEAD

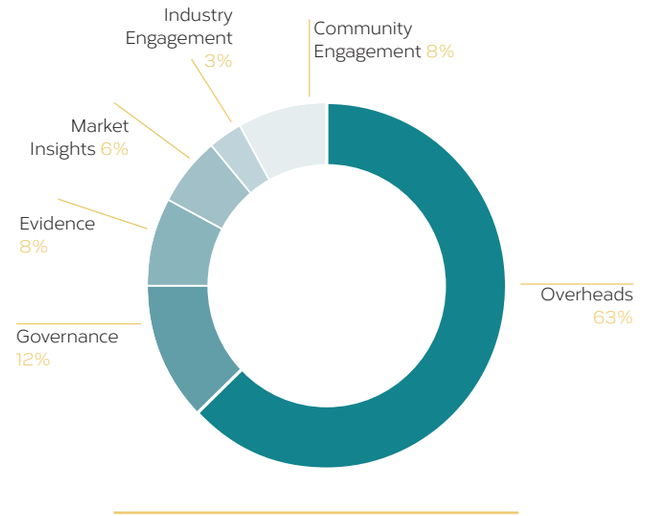
Funding via Foundation Contributor AEGIC is secured until June 30 2022, together with a highly motivated group of industry contributors. COVID 19 has impacted many businesses over the year, including GLNC. In many ways, it has helped the Council extend its reach, with a greater focus on digital campaigns and international networking facilitated by the focus on online conferencing. The Council is now better connected internationally, through presentations, meetings and research linkages. The move to remote offices, while feasible for the team and a significant cost saving, has meant that we have less contact with student dietitian interns - these circumstances also impact business development.

The year ahead brings a further reduction in the available budget for GLNC activities. Despite this, the Council continues to build reputation within the grain and food industry and with consumers and health professionals, but this restriction hinders year-to-year and longer term strategic planning. Since 2017 the Council has built key campaigns in Bring Back the Sandwich and Whole Grain Week, supporting smaller campaigns throughout the year. Whole Grain Week 2021 resulted in 11 million reach due to a televised Community Service Announcement, radio and retail advertising, alongside a range of social media initiatives.

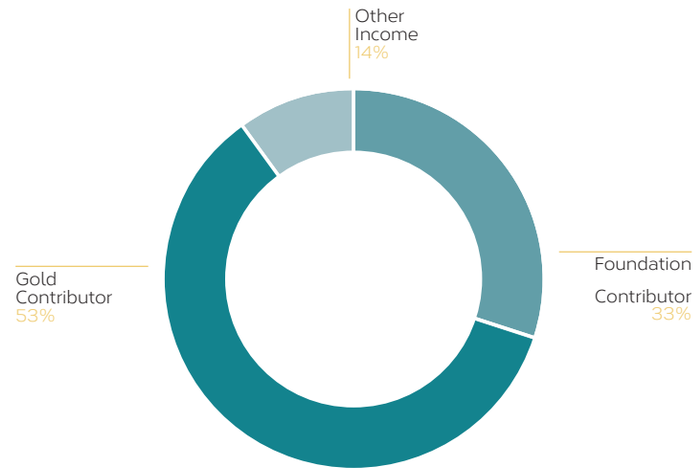
Research outcomes are exemplary in both their innovative content and reach and together with the focus on plant protein will continue into FY22, with supporting topics based on current strong trends in gut health, dietary fibre and sustainability as a compelling issue for consumers. Key categories in bread, grain-based snack bars and savoury biscuits will form the key audit focus, with several activities focused on bread and snacking.

GLNCs objective in FY22 is to place emphasis on the positioning of whole grains and legumes in the next Australian Dietary Guidelines (ADGs). Preparations will continue in this area so that GLNC is well positioned to provide a comprehensive submission and our systematic reviews are referenced in the evidence review. At the conclusion of FY22, a nine year impact assessment of the code of practice will be due - with over 1,000 registered products results already look favourable.

EXPENDITURE SUMMARY FY20



INCOME SUMMARY FY20



GLNC MANAGEMENT

Sara Grafenauer
GENERAL MANAGER

Sara was appointed General Manager of GLNC in May 2017. She is a fellow of Dietitians Australia and an 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 strategies.

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

Ron Storey
CHAIR

Ron Storey is an agribusiness consultant with specialist grains industry experience. Ron spent 20 years in international grain marketing, before establishing his own consulting business in 2000. Since 2000, Ron developed Australian Crop Forecasters (ACF) as a leading grains information business, which he sold in 2009. In parallel, Ron manages Storey Marketing Services, an agribusiness advisory service to the Australian grains and related industries.

Ron was a founding director and Chairman of AGT Plant Breeding (2002-2014), Australia's largest breeder in broadacre crops. Ron is currently Chairman and a director of Australian Export Grains Innovation Centre (AEGIC), and a former director of Pulse Australia, Mallee Sustainable Farming, Five Star Flour Mills (Egypt).

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..

Scott Mellings

COMPANY SECRETARY

Scott was appointed as the Company Secretary in November 2020 and has over 25 years of experience in Finance and Agriculture. He has had various roles in Accountancy, Private Equity, Banking and Grain & Livestock Production. Scott has a Bachelor of Business (Accounting) and is a CPA qualified Accountant.

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.

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.

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.; Lafiandra, D.; Grafenauer, S.; Hunt, W.; Solah, V. Noodles Made from High Amylose Wheat Flour Attenuate Postprandial Glycaemia in Healthy Adults. Nutrients 2020, 12, 2171.

Estell, M.; Hughes, J.; Grafenauer, S. Plant Protein and Plant-Based Meat Alternatives: Consumer and Nutrition Professional Attitudes and Perceptions. Sustainability 2021, 13, 1478. https://doi.org/10.3390/su13031478

Croisier, E.; Hughes, J.; Duncombe, S.; Grafenauer, S. Back in Time for Breakfast: An Analysis of the Changing Breakfast Cereal Aisle. Nutrients 2021, 13, 489. https://doi.org/10.3390/nu13020489

Abdullah, M.M.H.; Hughes, J.; Grafenauer, S. Healthcare Cost Savings Associated with Increased Whole Grain Consumption among Australian Adults. Nutrients 2021, 13, 1855. https://doi.org/10.3390/nu13061855

Commissioned Work

Marshall, S et al. The Effect of Replacing Refined Grains with Whole Grains on Cardiovascular Risk Factors: A Systematic Review and Meta-Analysis of Randomized Controlled Trials with GRADE Clinical Recommendation, Journal of the Academy of Nutrition and Dietetics, 120 (11) 2020, https://doi.org/10.1016/j.jand.2020.06.021.

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)