ISSN 1831-9424

European Commission

JRC SCIENCE FOR POLICY REPORT

Provision of ingredient, energy and full nutrition information on alcoholic beverages

An assessment of products placed on the EU market

Sarasa-Renedo, A., Moz-Christofoletti, M.A., Grammatikaki E., Wollgast, J.

2022

Joint Research Centre

EUR 31096 EN

This publication is a Science for Policy report by the Joint Research Centre (JRC), the European Commission's science and knowledge service. It aims to provide evidence-based scientific support to the European policymaking process. The contents of this publication do not necessarily reflect the position or opinion of the European Commission. Neither the European Commission nor any person acting on behalf of the Commission is responsible for the use that might be made of this publication. For information on the methodology and quality underlying the data used in this publication for which the source is neither Eurostat nor other Commission services, users should contact the referenced source. The designations employed and the presentation of material on the maps do not imply the expression of any opinion whatsoever on the part of the European Union concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Contact information
Name: Jan Wollgast
Address: Joint Research Centre, Directorate F, Health, Consumers and Reference Materials, Unit F1: Health in Society
Via Enrico Fermi 2749, TP 127, 21027 Ispra (VA), Italy
Email: Jan.Wollgast@ec.europa.eu

EU Science Hub
https://joint-research-centre.ec.europa.eu

JRC129446

EUR 31096 EN

PDF ISBN 978-92-76-53110-4 ISSN 1831-9424 doi:10.2760/89459 KJ-NA-31096-EN-N

Luxembourg: Publications Office of the European Union, 2022

How to cite this report: Ana Sarasa-Renedo, Maria Alice Moz-Christofoletti, Evangelia Grammatikaki, Jan Wollgast, *Provision of ingredient, energy and full nutrition information on alcoholic beverages*, Publications Office of the European Union, Luxembourg, 2022, doi:10.2760/89459, JRC129446.

Contents

Abbreviations

ABV	Alcohol by volume (%)
AICV	European Cider and Fruit Wine Association
CMO	Common Organisations of the Markets
EU	European Union
FIC	Food Information to Consumers (in reference to Regulation (EU) 1169/2011)
GNPD	Global New Products Database
JRC	Joint Research Centre
MoU	Memorandum of Understanding
QR code	quick response code
RTDs	Ready-to-Drink products
SKU	Stock-keeping unit

Abstract

Unlike foods and non-alcoholic beverages, alcoholic beverages containing more than 1.2% alcohol by volume are so far exempt from the obligation to display a list of ingredients and a nutrition declaration on the product label. Business operators may nonetheless provide these on a voluntary basis. In recent years, the alcoholic beverage industry has committed to different degrees of voluntary provision of information on ingredients and nutritional information. The current study characterises the market landscape from the point of view of the consumer, assesses the presence and the extent to which nutritional and ingredients information is provided on-label (i.e. ingredient information only, full nutritional declaration only, energy content only or a combination of those), and the presence of references to off-label (online) information on alcoholic beverages across EU Member States. Its aim is to complement the sector's self-monitoring reports with an additional snapshot of the market situation. The results will inform policy makers and support informed exchanges with stakeholders, in particular in the context of the Revision of the Food Information to Consumers Regulation (Regulation (EU) 1169/2011).

Acknowledgements

The authors wish to thank Fanny Salesse and Sandra Caldeira for support and thoughtful comments, and Anubha Sethia from Euromonitor International for her availability.

Authors

Ana Sarasa-Renedo, Maria Alice Moz-Christofoletti, Evangelia Grammatikaki, Jan Wollgast

Executive summary

Policy context

Alcohol consumption is a well-known risk factor for a series of conditions, including certain types of cancer. Regulation (EU) 1169/2011, on the provision of food information to consumers, exempts alcoholic beverages containing more than 1.2% alcohol by volume from providing a nutrition declaration and a list of ingredients. In recent years, the alcoholic beverage industry has committed to different degrees of voluntary provision of information on ingredients and nutritional information. The European Commission committed in Europe's Beating Cancer Plan to propose a mandatory indication of the list of ingredients and the nutrition declaration on labels of alcoholic beverages before the end of 2022. The Directorate-General for Health and Food Safety (DG SANTE) leads that action.

This study by the Joint Research Centre (JRC) is part of the data collection prior to that proposal, and can be used as a baseline in the context of the forthcoming proposal. As such, it consists of a market analysis to assess, from the consumer point of view, the current level of provision of information on ingredients and nutrition on alcoholic beverages sold off-trade (e.g. in supermarkets, shops, e-commerce etc as opposed to settings where alcohol is sold and consumed). The analysis relies on two different data sources: 1) a commercial database with data on newly launched and re-launched products between January 2018 and October 2021 (nearly 16 000 products analysed), and 2) an EU-27-wide store check campaign to collect alcoholic beverage information, carried out between July and December 2021 (nearly 9 000 products analysed). The categories of alcoholic beverages analysed were:

- Beer products
- Spirits
- Wine products
- Flavoured Alcoholic Drinks or Ready-to Drink (RTDs) products
- Ciders and perries

These categories are working definitions (based on existing categories in the commercial databases) and are not necessarily linked to the legal product categories.

Key conclusions

The possibility for the voluntary provision of ingredients and nutritional information on the labels of alcoholic beverages has been taken up by the alcoholic beverage industry. It has resulted in a diverse market landscape. Ingredient information is the type of information found in more products, followed by energy information. Nutritional information, including energy content and the 6 key nutrients (fat, saturated fat, carbohydrate, sugars, protein and salt) is the information provided less frequently to consumers.

Consumers of beer products have better access to ingredients and energy information than consumers of other alcoholic beverages. Ciders and perries, as well as RTDs, also provide this information relatively frequently. Spirits provide ingredients and energy content information in only some of their products and consumers of wine products very rarely have access to ingredient or energy information.

Consumers are much less exposed to full nutritional information than ingredient information. Full nutrition information is rarely displayed on spirits and wine product labels, increasing slightly in ciders/perries, beer products and reaching a modest proportion of RTD products.

Consumer exposure to off-label ingredients and nutritional information at the time of data collection was unusual.

These differences in the provision of information at single-product level (i.e. in the number of products) are reflected at market share level. Beers have higher shares of products sold that provide ingredients and energy information, followed by ciders/perries. The low availability of information on spirits and wine labels impacts the total alcoholic beverage market shares of products labelled with ingredients, energy or nutritional information.

Main findings

The results of this study show that there has been progress in the provision of ingredient, energy and nutritional information to consumers of alcoholic beverages and that the progress differs depending on the EU Member State and the sector of the alcoholic beverage off-trade market analysed. Consumers of beer products across the EU-27 can find ingredient information on most of the single products analysed (ca 88% of beer products sold across the EU), while energy content is present in 26% to 51% of products, depending on the data source. Consumers of ciders/perries can find ingredients on approximately half (47-54%) of single products analysed, and energy information on 22-42% of products. Over 43% of single RTD products analysed provide ingredient information, but the market shares of these labelled products are low. Provision of energy content on RTD products (23-39%) is relatively frequent. Consumers of spirits can find ingredient information in less than a quarter of single products analysed (15-21%), and energy at even lower frequencies (2-17%, depending on data source). Consumers of wine products only find ingredient or energy information in a small proportion of products (less than 2.5%).

Nutritional information provision is most frequent in RTD products, and yet it is discrete (9-15%). It is the least frequently provided information in beer products (8-9%), ciders/perries (3-5%), spirits (0.2-1%) and wines (0.1-0.2%).

At the time of data collection through store checks, the off-label provision of ingredients, energy and other nutritional information was anecdotal (present in only 5 out of 8838 sampled products).

While the data above reflect the number of products analysed, our study also looked at the market share of the products analysed. The findings for individual products are maintained when looking at the market shares of the product categories. The highest estimated market shares labelled with ingredients and energy within each product category are those of beers and ciders/perries. Nutritional information is much less present in the estimated market shares.

Related and future JRC work

The JRC provides crucial scientific and technical support to Europe's Beating Cancer Plan (COM(2021) 44 final), to several actions envisaged in the Farm to Fork Strategy (COM(2020)381 final), and to the impact assessment related to a proposal for a revision of Regulation (EU) 1169/2011 on the provision of food information to consumers, all including several labelling aspects.

Quick guide

This study was carried out by analysing two databases: the Mintel GNPD commercial database of newly launched and re-launched products, and a database created *ad hoc* by Euromonitor International with the product information collected visiting ca. 10 stores in each of the 27 EU Member States. In total, 15 943 newly launched or re-launched products were analysed, while 8 838 products were collected through store checks.

The products on both databases were analysed according to the provision of on-label information on ingredients, energy content and other nutritional information. The analyses were performed by product category, dividing products into five possible categories: beer products, spirits, wine products, Ready-To-Drink products (RTDs) and ciders and perries.

1 Introduction

Alcohol consumption is a well-known risk factor for a series of conditions, including certain types of cancer ([1]). In addition, alcohol provides energy upon intake (29kJ/g or 7 kcal/g) ([2]). Among several actions to reduce alcohol related harm, the Europe's Beating Cancer Plan ([3]) includes a proposal by the end of 2022 for the introduction of mandatory labelling of ingredients and nutrition declaration on alcoholic beverages.

Regulation (EU) 1169/2011 ('Food information to consumers' or FIC Regulation) ([4]) on the provision of food information includes the obligation to provide the list of ingredients and a nutrition declaration on-label. Alcoholic beverages containing more than 1.2% alcohol by volume (abv) are exempted from this requirement.

Despite this exemption from providing the list of ingredients, alcoholic beverages have to display on the label information about substances or products causing allergies or intolerances. In addition, food business operators may voluntarily provide the list of ingredients. Such information should then comply with the provisions governing the mandatory listing of ingredients. Member States could maintain national measures as regards the listing of ingredients of alcoholic beverages pending the adoption of harmonised EU rules.

Furthermore, the FIC Regulation also encourages food business operators to provide the nutritional information on a voluntary basis. This voluntary nutrition declaration on alcoholic beverages can include energy and nutrient content or be limited to the energy value.

In 2017, the Commission adopted a report ([5]), inviting the alcoholic beverage industry to submit a self-regulatory proposal on the provision of a list of ingredients and nutrition declaration across the entire sector of alcoholic beverages.

In 2019, the spirits industry, represented by SpiritsEUROPE, and the brewers industry, represented by the Brewers of Europe, each signed a separate Memorandum of Understanding (MoU) ([6,7]) where both committed to providing nutritional information and a list of ingredients on all products sold in the EU market. Specifically, SpiritsEUROPE committed to: i) provide the energy value on-label per 100ml and also per serving size; ii) present the energy labelling following specific criteria ([8]) and iii) display the ingredient list online according to certain criteria and elements ([9]). The SpiritsEUROPE objective is to ensure that the collective total EU market share (by volume) of products placed on the EU market providing energy information on-label and list of ingredients online will constitute at least 25% by 31/12/2020, 50% by 31/12/2021, and 66% by 31/12/2022. SpiritsEUROPE have recently published a second implementation report ([10]), after an interim report ([11]) and a first implementation report ([12]), with details on the progress of the initiative across different Member States.

As for the Brewers of Europe, the MoU establishes that: i) the ingredients should be listed on-label in descending order of weight as recorded at the time of their use in the manufacture of the beverage; ii) the nutrition information to be provided on label per 100 ml (e.g. energy (kJ/kcal) or all seven nutritional values) and iii) any additional nutrition information off-label or per portion could be displayed as supplementary information.

More recently, members of the European Cider and Fruit Wine Association (AICV) adopted a MoU on the provision of nutritional information and ingredient listing for cider and fruit wine sold in the EU ([13]). Signatories committed in June 2021 to: i) provide nutritional information per 100ml with the energy value in kJ/kcal on-label, while other nutritional information remains optional and can be provided on-line; ii) provide ingredient labelling, where ingredients must be listed in descending order of weight as recorded at the time of manufacturing following the provisions of regulation 1169/2011. This information can be made available either on-label, or on-line with on-label easy reference. To achieve the corresponding market share (by

([1]) Health Promotion and Disease Prevention Knowledge Gateway. Alcoholic Beverages (2019)
([2]) European Food Safety Authority (EFSA) Scientific Opinion on Dietary Reference Values for energy (2013)
([3]) Communication from the Commission to the European Parliament and the Council. Europe's Beating Cancer Plan COM/2021/44final
([4]) https://eur-lex.europa.eu/eli/reg/2011/1169/oj
([5]) https://ec.europa.eu/food/system/files/2017-03/fs_labelling-nutrition_legis_alcohol-report_en.pdf
([6]) https://beerwisdom.eu/wp-content/uploads/2019/09/mou-beer-label-web-001.pdf
([7]) https://spirits.eu/upload/files/publications/CP.MI-098-2019-MoU-Final%20Version%20on%20website%20without%20signature-%204%20June%202019.pdf
([8]) See page 7 of the SpiritsEUROPE Memorandum of Understanding.
([9]) See page 9 of the SpiritsEUROPE Memorandum of Understanding
([10]) SpiritsEUROPE Second implementation report (2022)
([11]) SpiritsEUROPE Interim progress report (2019)
([12]) SpiritsEUROPE First implementation report (2021)
([13]) https://aicv.org/en/news/aicv-adopts-a-labelling-commitment-for-ciders-and-fruit-wines

volume) of products providing nutritional information and ingredient labelling, AICV has set the following targets: 50% of market by June 2022, 65% of market by June 2023, and 80% of market by June 2024.

The SpiritsEUROPE MoU focuses on all spirit products sold in the EU but excludes miniatures and small bottles which are 35cl and less in size, and gift boxes and/or outer-packaging. The Brewers of Europe MoU covers all bottled and canned beers of more than 1.2% abv placed on the EU market. AICV does not mention product exemptions in their commitment.

As regards wines and aromatised wines, amendment Common Organisation of the Markets in agricultural products (CMO) ([14]) Regulation, and Regulation 251/2014 ([15]) introduce the mandatory labelling of ingredients and nutrition declaration. While the energy must be on the label, the ingredient list and the full nutritional declaration may be provided off-label via electronic means only.

To assess the label landscape that the EU consumers face off-trade, we conducted a descriptive analysis of new launches and re-launches of alcoholic beverages (above 1.2% abv) between January 2018 and October 2021 using Mintel's Global New Products Database (Mintel GNPD). We analysed the presence of ingredients and nutritional information (energy content and nutrients, or only energy content) on the labels of alcoholic beverages launched in the market of 23 Member States. This commercial database does not cover the remaining 4 EU markets (Cyprus, Luxembourg, Malta and Slovenia). The results of the study are discussed in **Section 2.1**.

This analysis was complemented with a data collection exercise relative to the ingredients and nutritional information on all EU-27 markets. Euromonitor International performed store checks on all EU-27 Member States and sampled approximately 250-300 unique products (recorded as 'stock keeping units' or SKUs) in each of the EU Member States. Euromonitor International collected the data on physical stores, sampling within five broad product categories (Beers, Spirits, Wines, Ready-to-Drink drinks or RTDs, and Ciders/Perries). A summary of this analysis is provided in **Section 2.2** and the comprehensive report of this exercise is available in Sethia et al. (2022) ([16, 17]).

([14]) https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32013R1308
([15]) https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32014R0251
([16]) Sethia A., Kishore Sharma N., Magaro R., Sedehizadeh S. Market Analysis on Label Information: Alcoholic Drinks in the EU (2022). DOI: https://doi.org/10.2760/074869
([17]) Sethia A., Kishore Sharma N., Magaro R., Sedehizadeh S. Alcohol on-label information dashboard (2022). https://data.jrc.ec.europa.eu/collection/id-00371

2 Market Analysis

2.1 Market analysis of newly launched/re-launched products in the EU (2018-2021)

2.1.1 Methods and data sources

To analyse the extent to which on-label ingredient and nutritional information (ingredient information and nutrition information/energy content only) are present in newly launched/re-launched alcoholic beverages across the EU Member States, we used the Mintel Global New Products Database (Mintel GNPD). This is an online database (created and maintained by Mintel, an international market research company) that tracks labelling information of newly launched/re-launched products in the market, including alcoholic beverages. For each product, the Mintel GNPD includes over 80 variables with information on different labelling features, such as ingredients and nutritional information, and presence of QR-codes.

Of relevance to the present analyses, Mintel GNPD contains the following product categories and subcategories (not necessarily in agreement with the legal product categories):

- Spirits (Whisky, Liqueur, Gin, Dark Rum, White Rum, Brandy, Vodka, Tequila, Other Spirits);
- Beer products ;
- Cider products;
- Wine products (such as Wine, Fortified and other Wines);
- Flavoured Alcoholic Beverages, which we here re-named Ready to Drink products (RTDs; including beer-based, wine-based, spirit-based, other).

The database also includes information on whether the entry is: (i) a new product, (ii) a new variety/range extension, (iii) new packaging, (iv) new formulation and (v) a re-launch, and on the type of labels: (i) private and (ii) branded label. The definitions for the different product categories, types of launch and labels are presented in Annex 1.

We focused our study on alcoholic beverages launched in the EU market (with the exception of Cyprus, Luxembourg, Malta and Slovenia, as these markets are not covered by Mintel GNPD) between January 2018 and October 2021. As a first step, we conducted an internal validation check, based on a representative sample (at the category level) of approximately 1 000 products ([18]). We examined individual pictures of the labels for the sample products, confirming that the information available in the dataset corresponded to the information displayed on the label.

Annex 2 of this report details the criteria used to assess whether products displayed or not ingredient and nutritional information.

2.1.2 Results

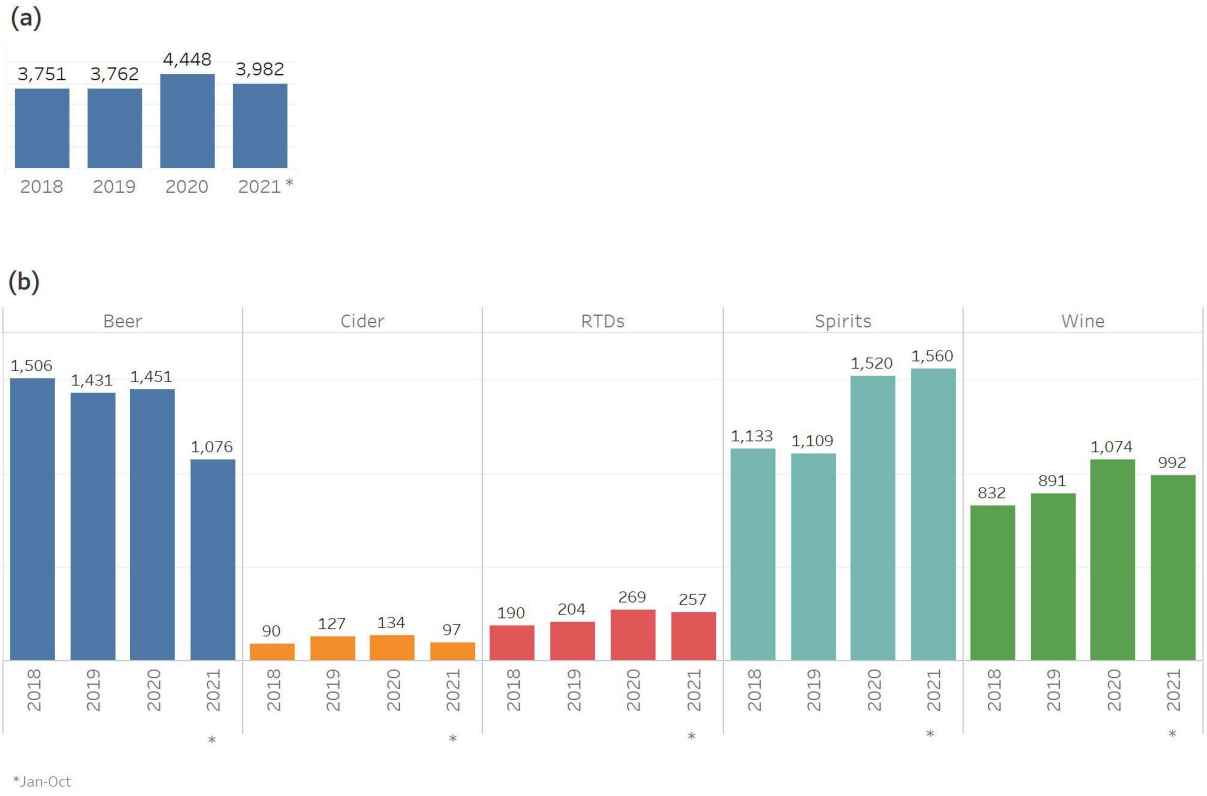
2.1.2.1 Product launches or re-launches

According to Mintel GNPD, there were 15 943 products launched between January 2018 and October 2021 in the EU Member States (except Cyprus, Luxembourg, Malta and Slovenia) – 5 464 beers, 448 ciders, 920 Flavoured Alcoholic Beverages, here ready-to-drink products (RTDs), 5 322 spirits and 3 789 wine products.

Figure 1. Number of total launches (new launches and re-launches) of products with >1.2% alcohol by volume for 2018-2021, **(a) per year and (b) per year and product category** shows the number of launches per year and per product category. Total launches increased from 2018 to 2020. For 2021, the data series is incomplete (only launches between January and October are included). Beers, followed by spirits and wine products, were the most frequently (re-)launched types of alcoholic beverages. (Re-)launches of RTDs increased throughout this period. Cider and related products were (re-)launched the least frequently.

([18]) 95% confidence level and 3% of margin of error.

Figure 1. Number of total launches (new launches and re-launches) of products with >1.2% alcohol by volume for 2018-2021, (a) per year and (b) per year and product category.



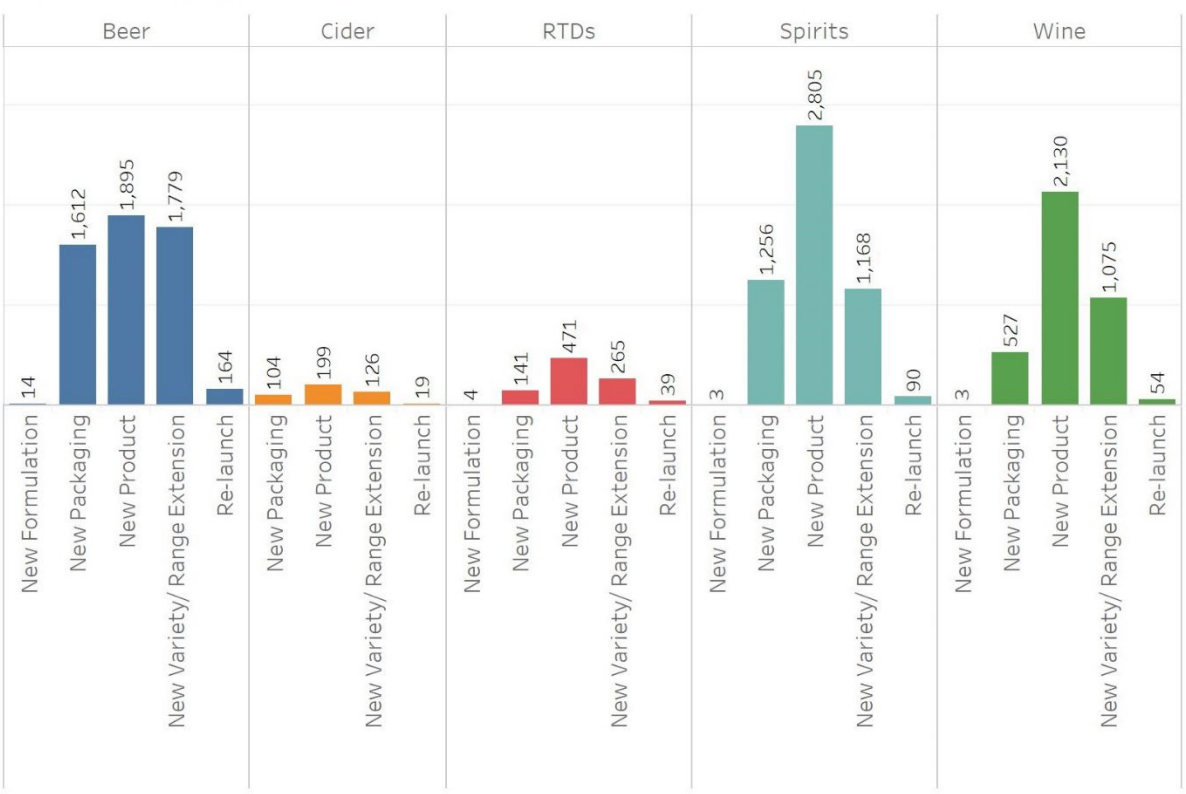
Source: JRC, Mintel GNPD, 01/2018-10/2021

The launch of new products was the most frequent type of launch in all categories (**Figure 2**), followed by new varieties/range extensions and by new packaging. Re-launches were not highly frequent, and new formulation launches were marginal in this sample. The majority of new product launches were spirits products, followed by wines and beers.

Products manufactured and sold by specific brands are recorded as 'branded labels', as opposed to 'private labels', which are products manufactured by one company for sale under another company's brand (typically the retailer or wholesaler). The majority of products in the database were branded label launches, with private label launches accounting for 6.5% of spirits launches, 7.4% of beer, 10.4% for wines, 11.8% for ciders, and 16.3% of RTDs (**Figure 3**).

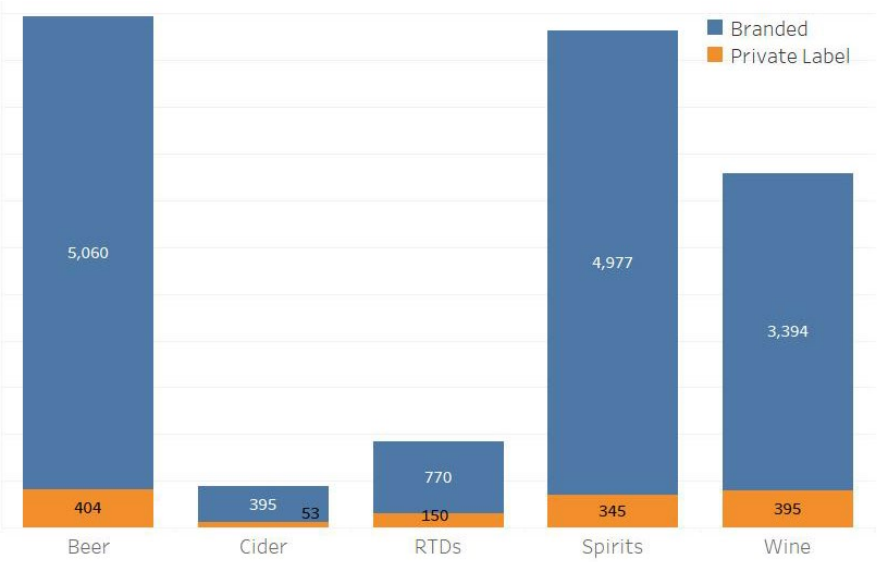
Most launches took place in the largest EU markets - France, Germany and Italy (**Figure 4**). France alone drove the launches of beers, ciders and spirits, while Germany led in the number of launches of RTD products. Both countries, followed by Spain and Italy, led the launches of wines.

Figure 2. Launches of products with >1.2% alcohol by volume for 2018-2021, by type of launch and product category. Note: number of ciders that are new formulations is zero



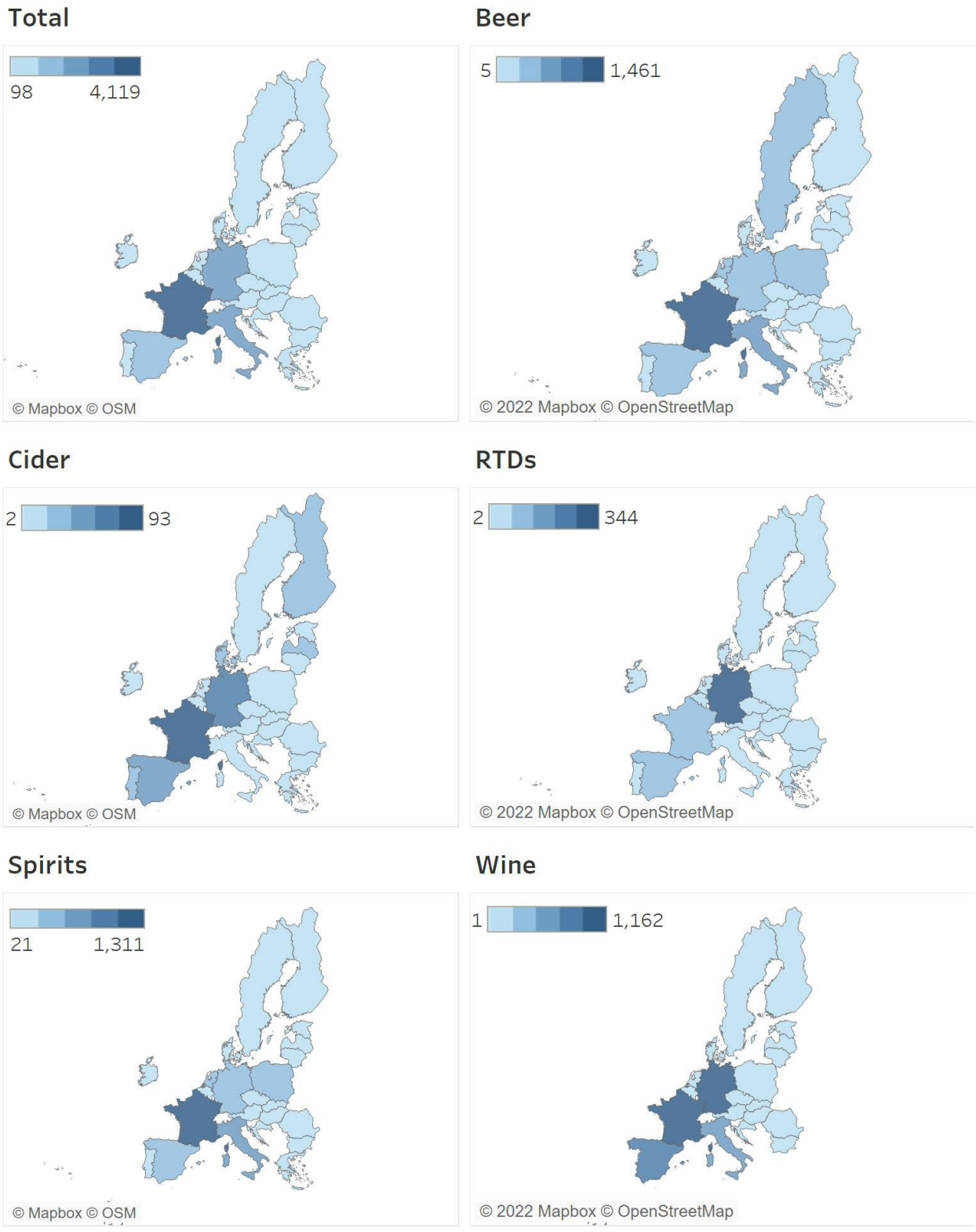
Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 3. Launches of products with >1.2% alcohol by volume for 2018-2021, by type of label (branded versus private label) and product category.



Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 4. Number of total launches of products with >1.2% alcohol by volume for 2018-2021, per country and product category.[1]



Source: JRC, Mintel GNPD, 01/2018-10/2021, using Mapbox® OpenStreetMap®.

[1] The legend indicates quintile increments in absolute terms (from 0 to maximum number of launches in the single country with most launches). Data for all EU Member States except for Cyprus (not depicted on the map), Luxembourg (blank on the map), Malta (not depicted/highlighted on the map) and Slovenia (blank on the map).

2.1.2.2 Ingredient information

There are large differences between product categories in providing on-label ingredient information (see annex 2 for definitions and **section 2.1.3** on the strengths and limitations of this analysis). For example, 87.5% of launched beer products (2018-2021) carried ingredient information, but this was the case for only 2% of wine products (**Figure 5a**). As for the remaining categories, 21.2% of spirits, 43.4% of RTDs and 46.9% of ciders displayed ingredient information.

Figure 5 also shows some variation in the provision of ingredient information within product categories, depending on the type of launch (**Figure 5b**). For example, launches of new products (which were the most frequent; see **Figure 2** for absolute numbers) differ greatly when it comes to displaying the list of ingredients. Over 85% of beers launched as new products carried ingredient information on their label, and this percentage went down to around 50% in RTDs, below 40% in ciders, 20% in spirits, and 2% for wines. In general, there is more variation between product categories than by launch type within a certain product category in the share of products carrying ingredient information on-label.

The picture is similar by label type (**Figure 5c**), with small differences within product categories between private and branded labels. The largest variation is for spirits, for which private labels declare ingredients more frequently than branded labels.

2.1.2.3 Nutritional information

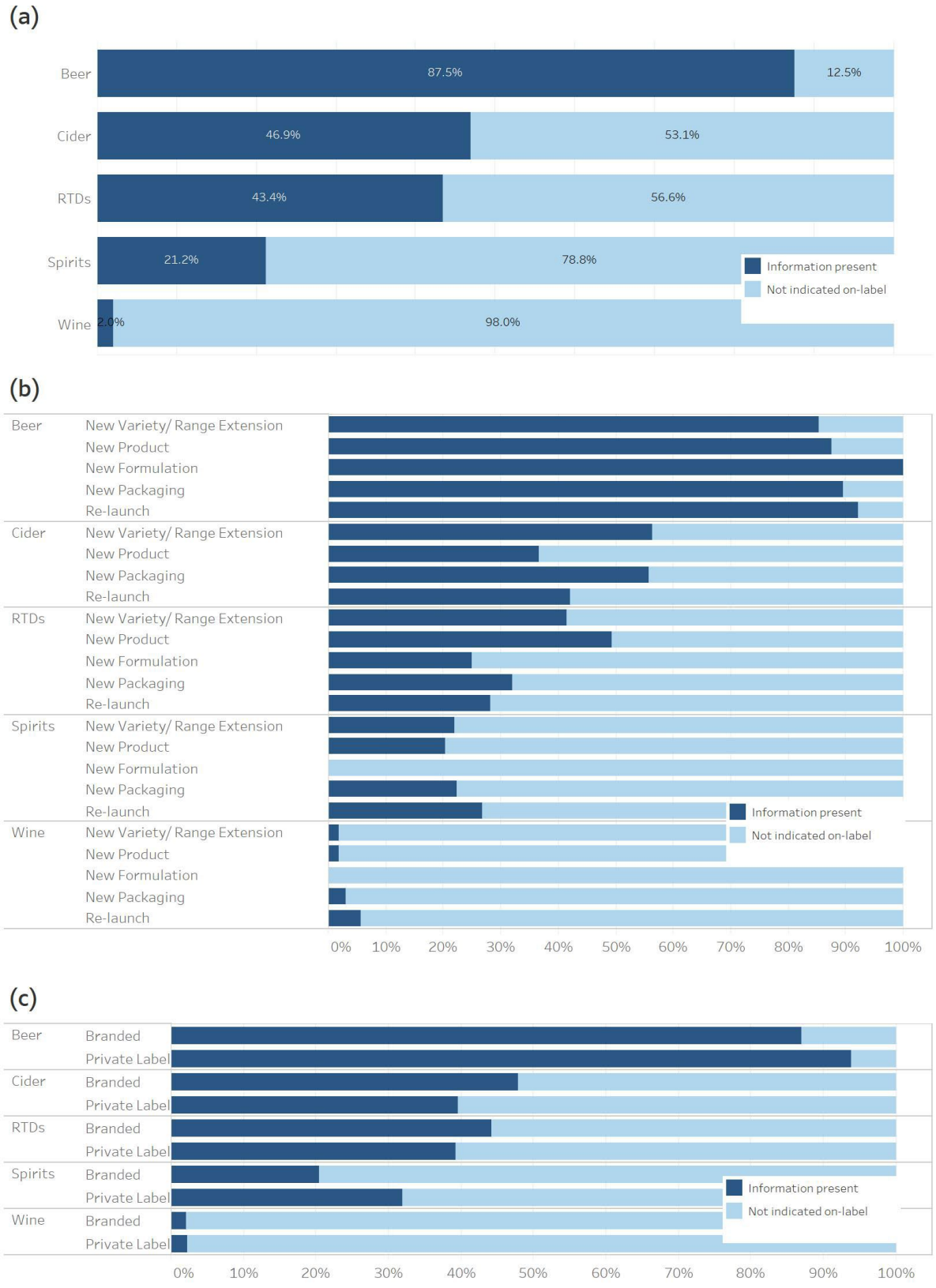
Nutritional information on alcoholic beverages can be information on energy content only or both on energy content and nutrient information. Most alcoholic products analysed in this report were not providing nutritional information; 74.4% of beer launches, 77.2% of RTDs, 78.1% of ciders, 91.8% of spirits and over 99% of wines do not display any on-label nutritional information. When they do, beers, ciders and spirits present energy content only more frequently, whereas RTDs report both energy and nutrient information more often **(Figure 6a**).

Among products that provide nutritional information (dark blue in **Figure 6a**), there are also differences. Article 30 from Regulation (EU) 1169/2011([4]) outlines the seven elements of a nutrient declaration; energy value, and the amounts of [total] fat, saturates [saturated fat], carbohydrate, sugars, protein and salt. In all product categories, most products displaying nutrient information present all seven elements of a nutritional declaration (**Figure 6b**), with the exception of spirits, in which only 50% present all elements. Beer products are the category that displays nutritional information with all elements most frequently, followed by ciders and wines. Nutritional information not presenting all elements lacks information on fat, saturated fat, protein and salt most often while energy, carbohydrates and sugars content are included more frequently.

Finally, the majority of products that provided energy information did so providing energy values both in kilojoules (kJ) and in kilocalories (kcal) (**Figure 6c**).

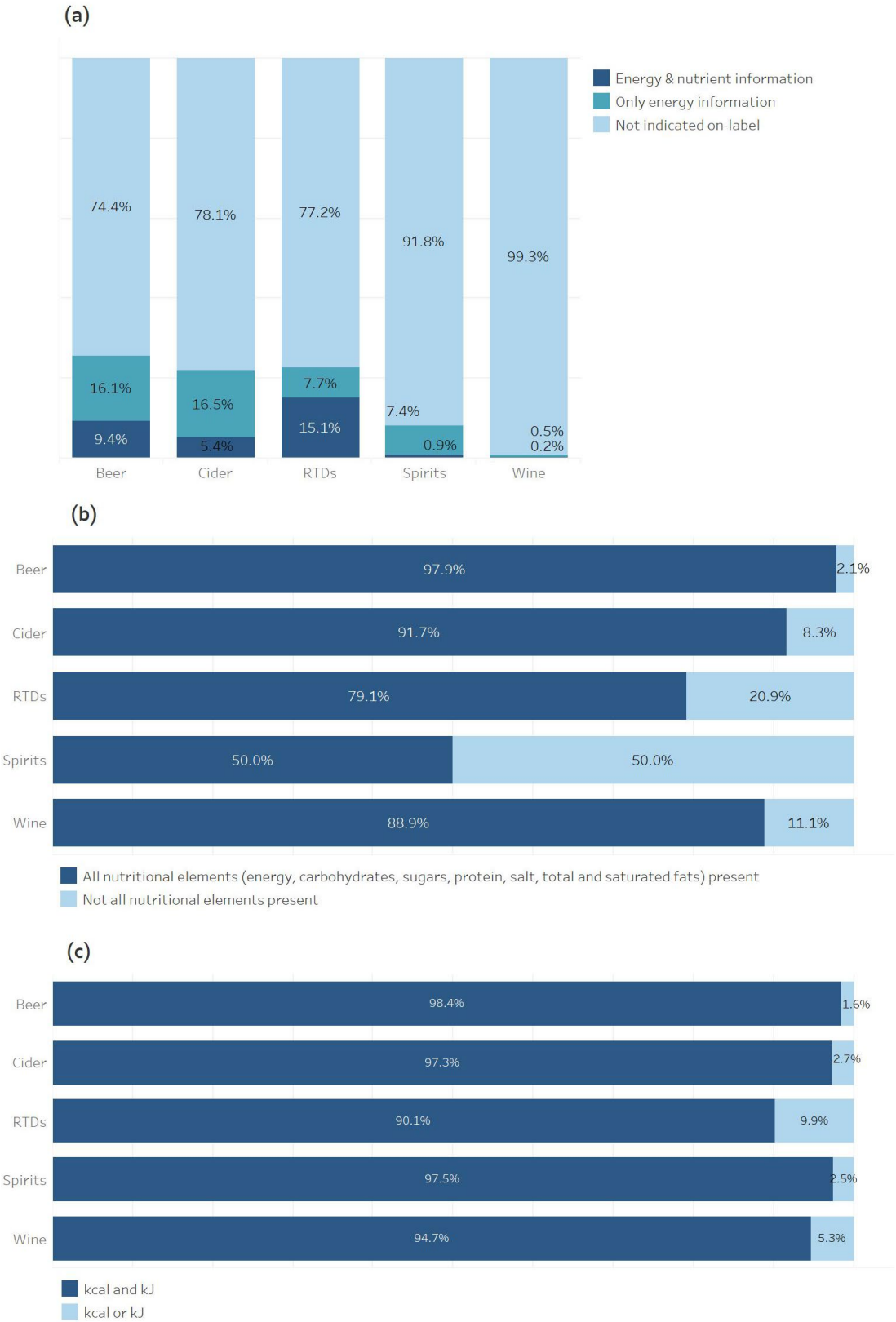
Nutritional information is found more often in newly formulated beers, whereas among RTDs, it is more frequent in both new products and in re-launched products (**Figure 7**). New packaging launches in turn, tend to have only energy information, if nutritional information is provided. RTDs launched under branded labels, when providing nutritional information, tend to provide both energy and nutrient information, and so do ciders launched under private labels (**Figure 8**). A larger share of branded labels provide nutritional information, except for wines, where the few products providing any information are mostly commercialised under private labels.

Figure 5. Ingredient information on-label of products with >1.2% alcohol by volume for 2018-2021, (a) per product category, (b) per product category and type of launch, (c) per product category and label type.



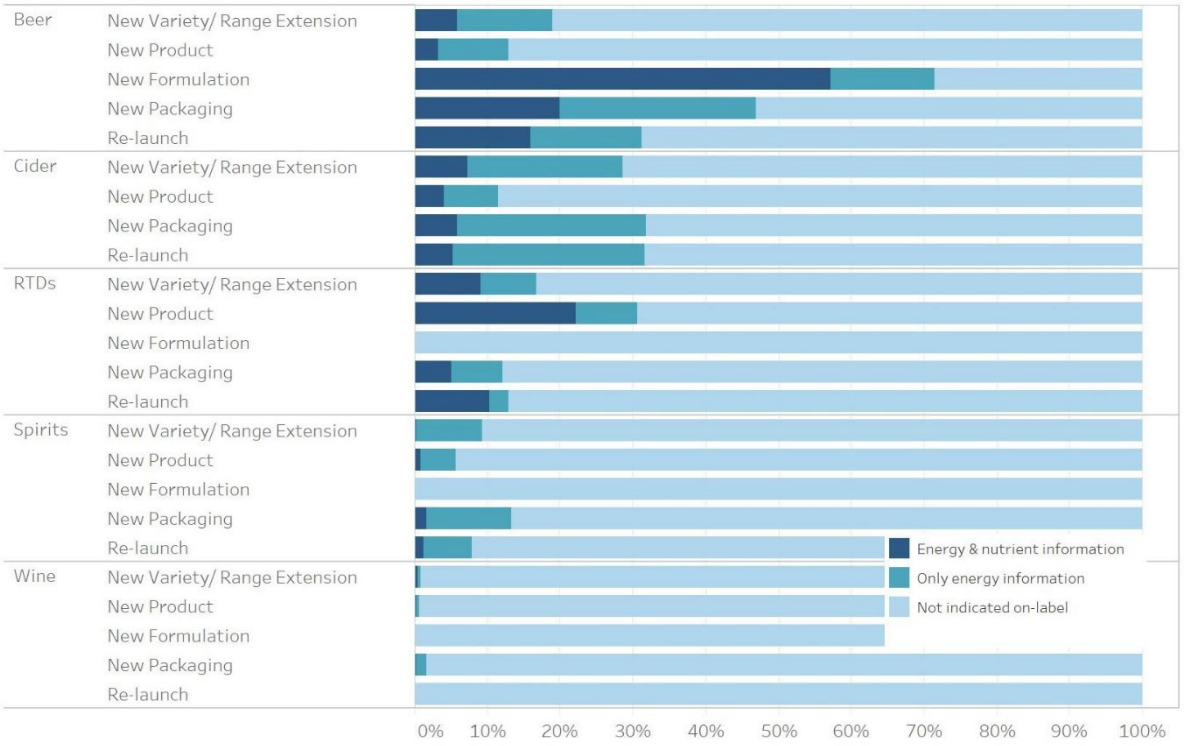
Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 6. Nutritional information on-label of products with >1.2% alcohol by volume for 2018-2021. (a) Nutritional information (Energy and nutrient, only energy, or none) per product category. (b) For those products declaring any nutritional information, those listing all nutritional elements and those not listing all seven elements are presented per product category. (c) For those products declaring only the energy content, those listing both kcal and kJ, and those listing either kcal or kJ are presented per product category



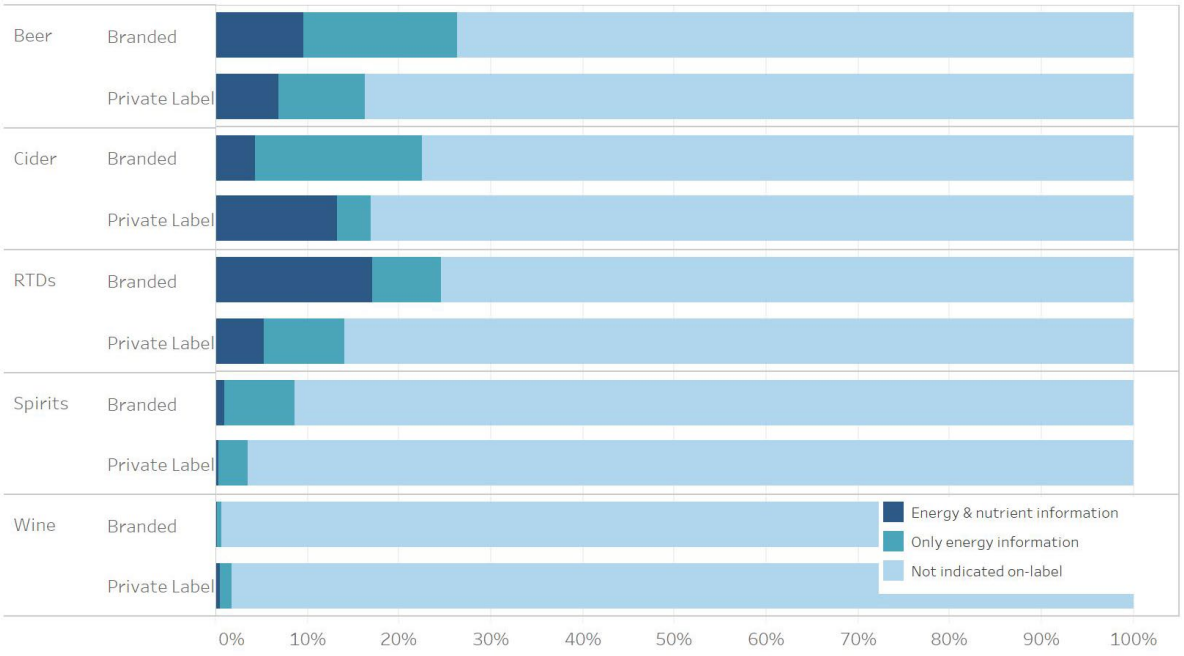
Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 7. Nutritional information (energy and nutrient, only energy, or none) on-label of products with >1.2% alcohol by volume for 2018-2021, per product category and launch type.



Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 8. Nutritional information (energy and nutrient, only energy, or none) on-label of products with >1.2% alcohol by volume for 2018-2021, per product category and label type.



Source: JRC, Mintel GNPD, 01/2018-10/2021

2.1.2.4 Time trends

Despite the fact that the study period covers only 4 years and data for 2021 only includes products launched until October, we observe a slight upward trend in the proportion of beer labels providing nutritional information and, more pronouncedly, in both the shares of RTDs carrying either full nutritional information or energy only information (**Figure 9a**). The share of spirits with at least energy only information also increased progressively.

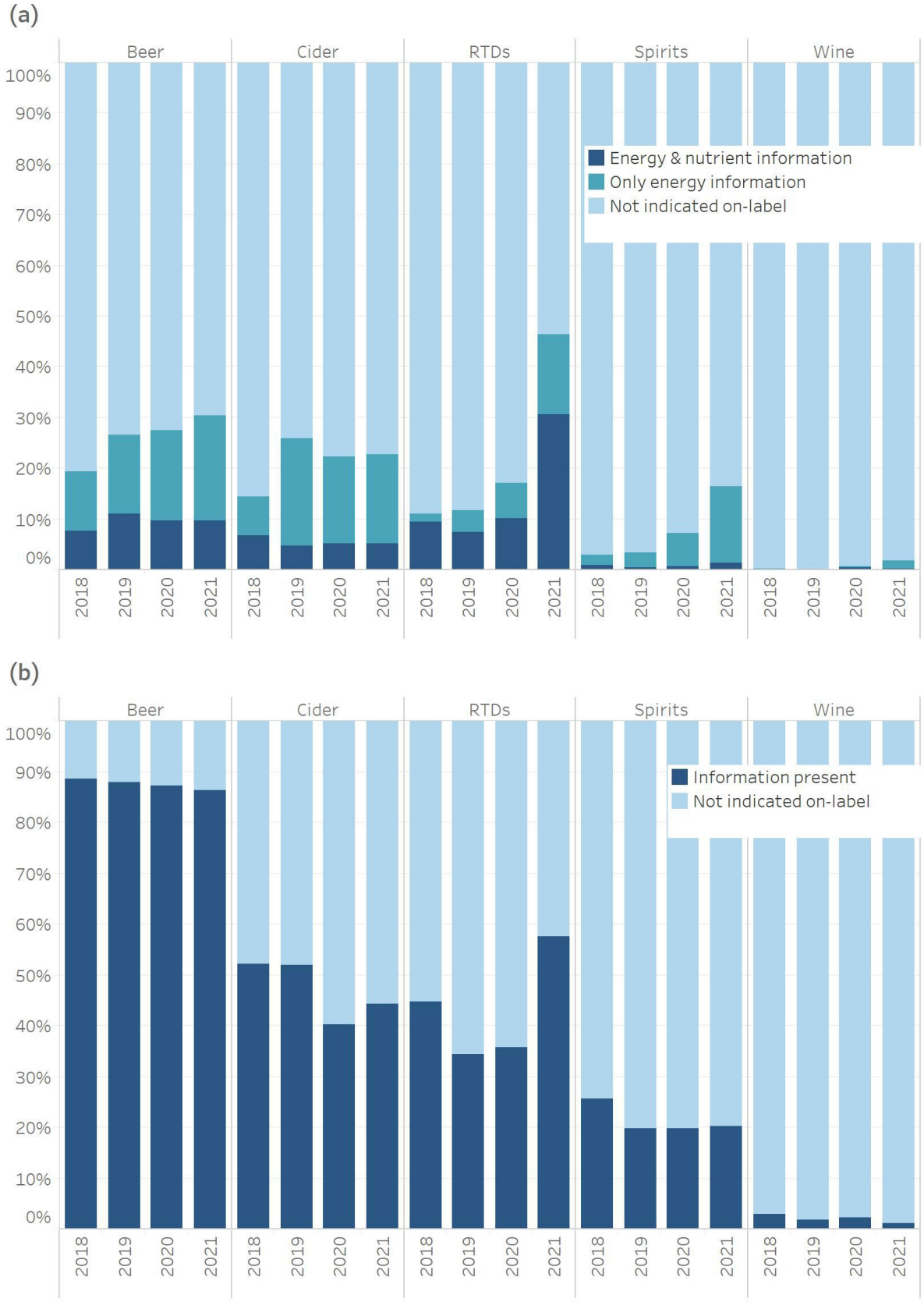
Trends in the provision of ingredient information are less clear (**Figure 9b**). Overall, the share of products with ingredient information is consistently higher than those with nutritional information across all categories, with some differences between product categories; stable in beers and spirits, fluctuating in ciders and RTDs.

2.1.2.5 Combined ingredient and nutritional information

Figure 10 details the extent to which ingredient and nutritional information appear on-label of products with >1.2% alcohol by volume for 2018-2021.

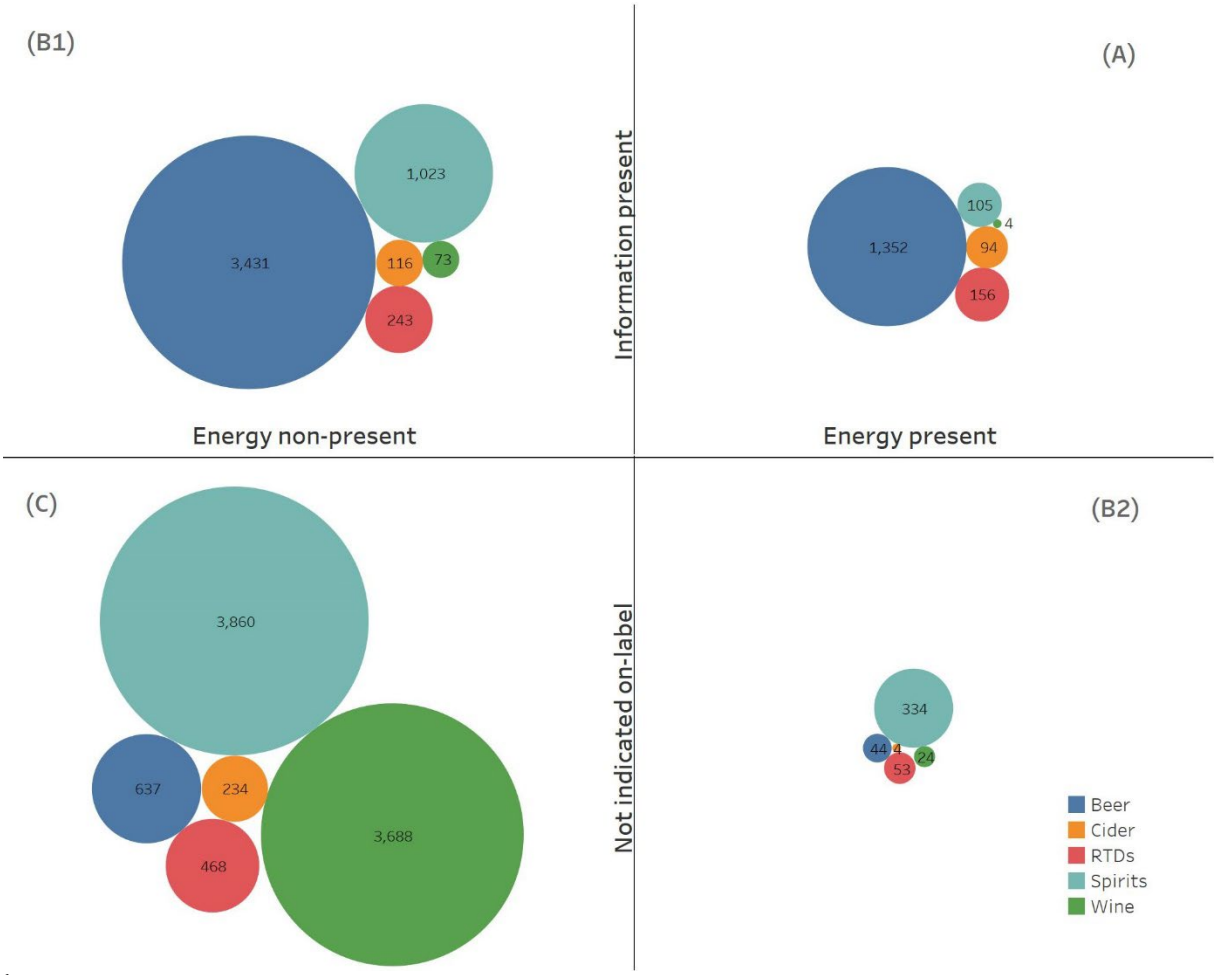
Quadrant A shows that there is a limited number of products that display both ingredient and energy information (i.e. energy information is provided, either alone or as part of the nutritional information); beers are the products most frequently displaying both. On the other hand, **Quadrant C** shows those products not displaying either ingredient or energy information; this is clearly the quadrant where most products fall, although most launches in this quadrant are of spirits and wines. The information on the other quadrants shows that it is much more common for labels to present ingredients and not energy (**B1**) than to present energy and no ingredient information (**B2**).

Figure 9. Provision of information on-label of products with >1.2% alcohol by volume for 2018-2021, per product category and year. (a) Nutritional information (energy and nutrient, only energy, or none). (b) Ingredient information.



Source: JRC, Mintel GNPD, 01/2018-10/2021

Figure 10. Quadrant chart showing number of products with >1.2% alcohol by volume for 2018-2021 that provide ingredients and energy[1] information, per product category. A: Products in this quadrant carry labels with both ingredient and energy information (either only energy, or as part of the nutritional information). B1: Products in this quadrant carry labels with ingredient information, and do not display energy information. C: Products in this quadrant carry labels without ingredient information and without energy information. B2: Products in this quadrant carry labels without ingredient information, and with energy information (either alone or as part of the nutritional information).



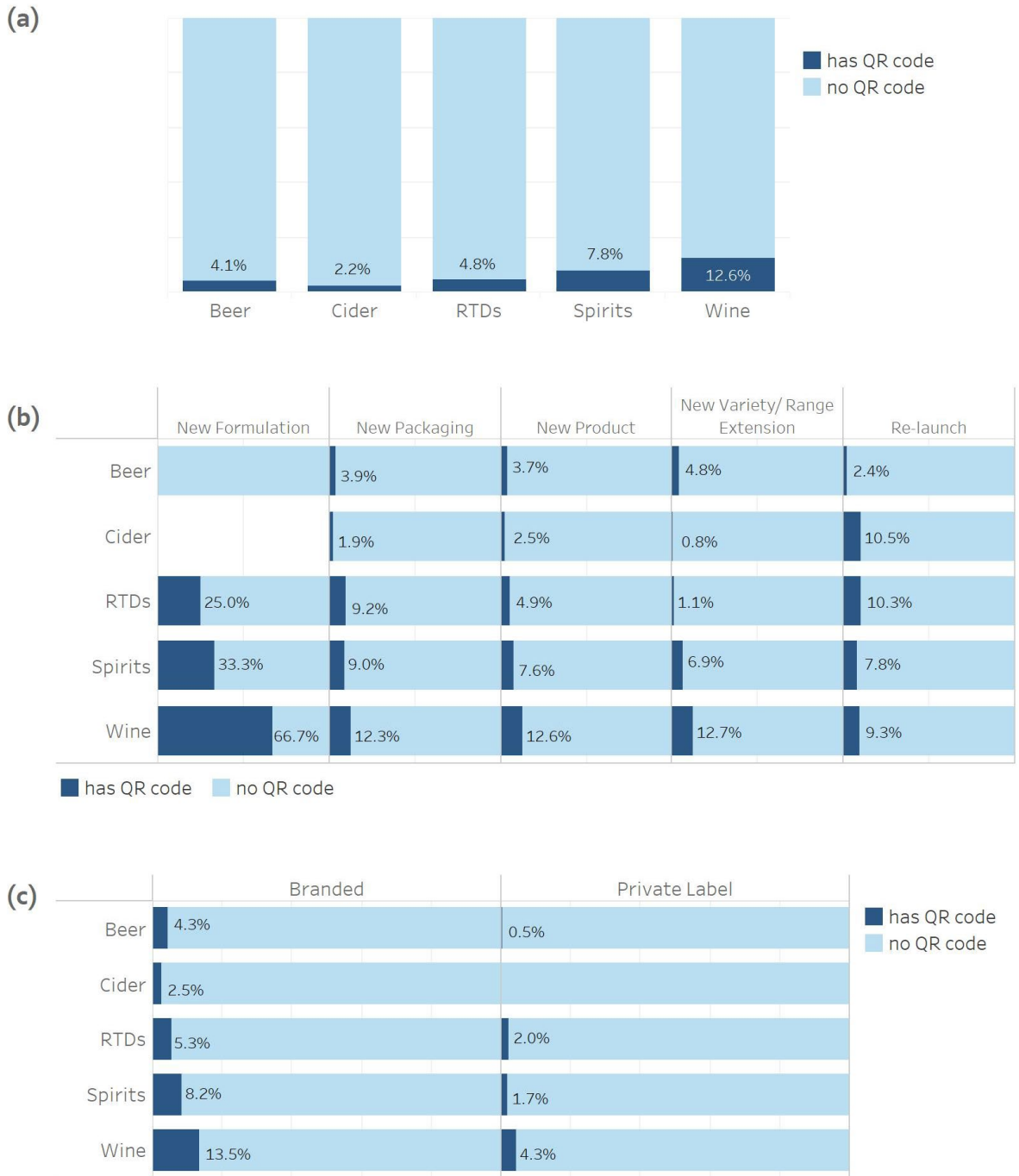
[1] "Energy present" on X axis means that the energy information is provided, either alone or as part of the nutritional information.

Source: JRC, Mintel GNPD, 01/2018-10/2021

2.1.2.6 Presence of a QR code

QR codes can direct the consumer to a website with additional information on the product or the brand. It has been proposed that information on ingredients, energy or other nutrient information can also be provided in this way, off-label (amendments to ([14]) and ([15])). The information contained in the Mintel GNPD database allows us to identify products with a QR code, but not whether they direct the consumer to information on products ingredients and nutritional information. Nonetheless, **Figure 11** shows that very few products carry a QR code on the label. Wines are the product category most frequently carrying a QR code **(Figure 11a**). New formulations in wines, spirits and RTDs most frequently carry QR codes on their labels (**Figure 11b**). However, those are minority launches (see **Figure 2**). New packaging, new products and new varieties/range extensions are the most frequent launches across all product categories; among those launch types, wines carry QR codes most frequently, followed by spirits and RTDs. Re-launches are also minority launches in the total sample. Most of the products analysed are from branded labels as opposed to private labels (see **Figure 3**). QR codes are more frequent in branded products, especially in wines, followed by spirits and RTDs. QR codes in beers from private labels are almost non-existing, though beers are the most frequently marketed product category under private labels. Again, wines are the products most frequently carrying a QR code under private labels.

Figure 11. Presence of a QR code on the product packaging of products with >1.2% alcohol by volume for 2018-2021. (a) Per product category. (b) Per product category and type of launch. (c) Per product category and label type.



Source: JRC, Mintel GNPD, 01/2018-10/2021

2.1.3 Limitations and strengths of the data used and analysis

Mintel GNPD is an online database that tracks labelling information of newly launched/re-launched products in the market. The main limitation of the analysis above is indeed that the information on product (re-)launches does not necessarily mimic the market landscape. There is no information on whether the product remained in the market or what its market share is. Nonetheless, these data are useful to identify trends in providing ingredient and nutritional information over the 4-year time period (between January 2018 and October 2021), and as shown in this study, allow detecting the large differences in reporting of ingredient and nutrition information.

The data collection methodology also limits the degree to which a detailed analysis can be performed. For example, Mintel does not collect information on whether the ingredient information is clearly marked or preceded by the word(s) 'ingredients' or 'list of ingredients' (as required by the FIC regulation for other products). We have noticed, when comparing individual pictures of the labels with the information detailed in the database, that some products are classified as providing ingredient information when the labels provide only mandatory (e.g. allergen) information. We therefore conclude that the information in the database may over-estimate the number of products providing ingredient information. As for QR code provision, the data identify labels with a QR code, however, there is no information about the webpage/kind of information it links to. Given the limited number of QR codes identified, this does not actually hamper any conclusions regarding absence of QR codes on labels.

Alcoholic beverages are sometimes packed with non-alcoholic drinks or other products (e.g. chocolates); in those cases, we often found that the available list of ingredients was limited to the composition of the non-alcoholic products.

2.1.4 Summary of main findings

We analysed the provision of on-label and (to a limited extent) off-label nutritional and ingredients information (list of ingredients and full nutrition declaration/ energy content only) on newly launched alcoholic beverages across the EU Member States. These analyses rely on data from products introduced in the EU market between January 2018 and October 2021.

There was a large variation of the extent of on-label **ingredient information** across beverages categories: approximately 88% of beer products, 43% of RTDs, 47% of ciders, 21% of spirits and 2% of wines displayed ingredient information. As for **nutritional information**, the majority of alcoholic beverages analysed did not present any nutritional information; only 26% of beer launches provided nutritional information, 23% of RTDs, 22% of ciders, 8% of spirits and less than 1% of wines. In beers, ciders and spirits, it was more frequent to present only the energy information, whereas RTDs provided all major nutrients (energy, fat, saturated fat, carbohydrate, sugars, protein and salt) more frequently. In addition, very few of the products analysed displayed a QR code on the label. This suggests that off-label nutritional or ingredient information on newly launched products is rare (in particular if one considers that the QR codes identified would likely link to other types of information too, not related to nutrition or ingredient information). Lastly, our findings indicate that only a small proportion of newly launched alcoholic beverages provided both on-label ingredient and nutrition information.

2.2 Market analysis of off-trade products in the EU-27

2.2.1 Summary of methods

The data summarised in this section, on the presence of information on ingredients, nutrition and energy content on the labels of alcoholic beverages, were collected by Euromonitor International. Data was collected for 5 product categories (Beers, Spirits, RTD products, Wine products, and Cider/Perry; not necessarily following any legal product categories) in a two-phase store-audit, with 10 store checks per EU Member State (sampling 250-300 unique products across all categories of alcoholic beverages). The analysts applied soft quotas across the 5 product categories based on sales data. A comprehensive analysis can be found in Sethia et al. ([16, 17]).

Euromonitor International provided data on the distribution of alcoholic beverages that displayed:

- Ingredient information
- Nutrition information
- Energy content
- Indication of off-label information (presence of QR codes or other links to websites).

The first pilot phase consisted of store checks in a large city in 3 EU Member States (Germany, Spain and Poland), and took place between July and September 2021. The second phase consisted of field research in the remaining 24 EU Member States, based on adjustments made during the pilot phase and took place between October and December 2021.

Euromonitor International also provided estimates for market share and size in volume for years 2018-2020. This information was available for all EU Member States except for Cyprus, Luxembourg and Malta. Market shares were calculated using the data collected via the store checks together with sales data at brand level from Euromonitor International. Market share estimates are downward estimates; they are based on market size and brand share data from the top 20 brands in a market. Often the market is very fragmented and each brand accounts for a very small share of the market. Not in all cases would those 20 top brands have been sampled during field research. Therefore, the market share estimates provided are conservative and represent the minimum market share in a certain EU Member State that carries certain information on-label.

2.2.2 Summary of results

The total number of individual products sampled across the EU-27 throughout both phases of the study was 8 838 alcoholic drinks (1.2% abv or higher): 1 968 beer products, 2 741 spirits, 3 210 wine products, 566 RTDs, and 353 ciders/perries.

Briefly, 29.6% of the analysed unique products (stock keeping units; SKUs) across the EU-27 carried on-label ingredient information; sampled beers had the highest presence of on-label ingredient information (87.8%), followed by 54.4% of cider/perries, and 44.3% of RTDs. As of spirits, 14.9% of SKUs carried ingredient information. Wine products only carried ingredients information in 1.1% of analysed products.

Energy content, either alone or as part of nutrient information, was present in 21.6% of sampled SKUs. Beer products declared energy on 50.8% of their labels across the EU-27. Ciders/perries (42.2%) and RTDs (38.9%) also frequently carried energy information. Spirits carried energy information less frequently, on 16.8% of the products. In contrast, wines only carried energy information in 2.4% of analysed SKUs across the EU-27.

Nutrition information (energy content and the 6 nutrient elements: total fat, saturated fat, carbohydrate, sugars, protein and salt) was less frequently present on labels of alcoholic products analysed, only in 2.5% of the sample. It was present in 8.5% of RTDs, followed by 7.7% of beers, and 3.1% of ciders/perries. Only 0.2% of analysed spirits and 0.1% of analysed wines included this nutritional information.

A summary of the frequencies of ingredients, full nutrition and energy content displayed on the labels of the analysed products is presented, by EU Member State and product category, in **Figure 12**.

The presence of information on ingredients together with energy content was found in 47.3% of sampled beers, in 38.2% of ciders/perries, and 25.4% of RTDs. In contrast, only 2% of spirits and 0.1% of wines carried information on both ingredients and energy.

From the five product categories, beers had the highest estimated market shares of products labelled with ingredient information. In 9 EU Member States more than half of the minimum estimated market share was of products displaying ingredients information. In 12 other Member States this value was between 25% and 50%, and in 3 EU Member States this share was between 16.9% and 25%. Additionally, there is a relatively high number of Member States for which market share estimates of spirits and RTDs with ingredient information were zero, and in the remaining countries the market share of products with this information was low. As for ingredient information on the labels of ciders/perries, the minimum estimated market share of products with this information was above 50% in 5 Member States, between 25 and 50% in other 7 Member States, and between 4.1 and 25% in other 7 Member States. The market shares of wines with ingredient information are very low, they are zero for 20 of the countries analysed and, in the remaining 4 EU Member States, the market shares of these products were estimated between 0.2 and 1.3%. The minimum market shares of products with ingredients information on the labels are presented, by EU Member State and product, in **Figure 13 (Top)**.

Nutritional information is less frequently displayed on alcoholic drinks across the EU, and this is reflected in the estimated minimum market shares of products presenting such information (**Figure 13, Middle**). Again beers fare best, even though the market shares are zero in 13 out of the 24 EU Member States. Ciders/perries present nutritional information at market share level in 5 out of 24 markets, representing at least from 1.7% to 14.5% of market share in those EU Member States. RTDs and wines show similar patterns, with market shares of products with nutritional information on their label equal to zero in most EU Member States (21 and 22 respectively, out of 24), and very low shares in products of the remaining EU Member States, especially in wine products. In the case of spirits, according to estimated market shares, consumers seem to have no/little access to nutritional information, as in the only EU Member State for which market shares of spirits products with nutritional information on the label could be estimated, it was 0.9%. The market share estimate was zero for the remaining 23 EU Member States.

The minimum market shares of products with energy content on their labels (**Figure 13, Bottom**) are higher than those with nutritional information. The estimated market shares reflect that products in all 24 EU Member States carried labels with energy information to some extent. In the case of beers, the minimum estimated market shares of these products was between 7.2 and 25% in 6 EU Member States, between 25 and 50% in 13 EU Member States, and above 50% in 5 EU Member States. Ciders/perries had varying levels of provision of energy information across EU Member States, with market share estimates for products with information above the 50% mark in 3 EU Member States and 5 EU Member States in which the market share estimate was zero. Though with low estimated market shares, spirits displaying energy information can be found in the majority of EU Member States (20 out of 24 researched markets). Market shares of RTDs and, to a lesser extent, wines also reflect the presence of energy level on-label (12 and 7 EU Member States' markets, respectively).

Finally, only 5 out of the 8 838 analysed products carried a QR code or another weblink that actually led to nutritional information on-line. Those 5 products were 3 wine products, one spirits drink, and one RTD, and were sampled in Finland (one product) and the Netherlands (4 products).

Detailed results of this study can be found in Sethia et al. ([16, 17]).

Figure 12. Frequency[1] of products labelled with ingredients (Top), nutritional information (Middle) and energy content (Bottom), by EU Member State[2] and product category.

Ingredients	EU27	AT	BE	BG	HR	CZ	CY	DK	EE	FI	FR	EL	HU	IE	IT	LV	LT	LU	MT	NL	PT	RO	SK	SI	SE	ES	PL	DE
Alcoholic beverages	29.6	23.4	30.7	15.3	35.9	39.9	22	41.2	26.9	55.9	25.2	22.3	47.7	7.5	36.4	30.7	26.3	22.5	18.1	31.1	19.4	42.6	48.1	24.7	37.2	30.1	19.9	23.9
Beers	87.8	83.8	79.1	100	73.6	100	81.9	80	82.3	95.6	79.2	93.4	97.6	54.5	93.1	83.8	86.4	87.7	80.4	89.9	90.2	95.3	98.2	90.6	80	94.4	89.5	100
RTDs	44.3	8.8	27.3	42.9	100	0	25	73.9	57.6	92.3	41.2	33.3	81.6	12.1	48.3	30	70.4	0	11.1	25	60	50	50	77.3	25	60	46.7	0
Wine	1.1	0	4.2	0	2.7	2.1	0	1.5	0	2.1	0.9	0	0	0	1.5	0	0	0	0	0	0	2.9	6.7	1.3	14.1	0	0	0
Spirits	14.9	3.2	13.7	1.2	23.5	80.4	1.7	4.5	0	0	11.8	3.8	40.8	0.9	39.2	4.6	9.8	12.1	11.6	8.7	6.2	45	52.7	9.4	0	1.5	0.6	0
cider/perry	54.4	50	35.3	100	100	100	75	100	100	92	3.8	100	84.6	6.7	0	54.5	67.9	15.8	57.1	46.2	100	100	100	100	20.8	25	0	52.9

Nutrition	EU27	AT	BE	BG	HR	CZ	CY	DK	EE	FI	FR	EL	HU	IE	IT	LV	LT	LU	MT	NL	PT	RO	SK	SI	SE	ES	PL	DE
Alcoholic beverages	2.5	0.3	0	0	0	0	0.9	0	1.9	15.1	7.3	1	9	5.3	0	0	0	1	0	10.3	0	1.4	0.6	2.4	0.8	3.9	0	6.1
Beers	7.7	1	0	0	0	0	2.8	0	0	23.7	29.9	1.6	26.8	33.3	0	0	0	5.3	0	34.2	0	6.3	1.8	0	2.2	4.7	0	28.4
RTDs	8.5	0	0	0	0	0	0	0	18.2	33.3	0	16.7	15.8	12.1	0	0	0	0	0	6.3	0	0	0	22.7	0	45	0	0
Wine	0.1	0	0	0	0	0	0	0	0	1.1	0	0	0	0	0	0	0	0	0	0	0	0	0	1.3	0	0	0	0
Spirits	0.2	0	0	0	0	0	0	0	0	0	0	0	1.9	0.9	0	0	0	0	0	0	0	0	0.7	1	0	0	0	0
cider/perry	3.1	0	0	0	0	0	8.3	0	0	20	0	0	7.7	6.7	0	0	0	0	0	15.4	0	0	0	0	0	8.3	0	0

Energy	EU27	AT	BE	BG	HR	CZ	CY	DK	EE	FI	FR	EL	HU	IE	IT	LV	LT	LU	MT	NL	PT	RO	SK	SI	SE	ES	PL	DE
Alcoholic beverages	21.6	16.7	27.5	19.2	26.5	20.7	15.7	31	32.9	56.2	15.3	25.2	23	32.4	12.7	18.5	9	10.1	16.5	30.1	2.5	14.4	18.4	14.8	16.7	26.7	29.1	20.2
Beers	50.8	32.3	37.2	42.9	56.3	55.7	44.4	47.5	79	82.5	41.6	60.7	41.5	81.8	52.8	20.3	52.3	29.8	47.1	65.8	9.8	43.8	40	32.1	41.1	61.7	80.3	70.4
RTDs	38.9	14.7	50	71.4	0	0	50	69.6	78.8	84.6	5.9	58.3	57.9	60.6	10.3	18.3	11.1	0	22.2	27.1	60	12.5	14.3	54.5	16.7	50	53.3	7.7
Wine	2.4	0	8.3	0	0	0	0.6	4.6	5	7.4	0.9	0.8	0	12.4	0	0	0.9	1.1	2.6	5	0	0	3.3	1.3	0	3.3	6.8	0.6
Spirits	16.8	26.3	30.5	15.6	17.1	30.4	11.7	27.3	13.8	54.8	18.4	28.6	15.5	30.6	4	20.4	0	7.6	18.9	20.7	0	7.2	17.1	13.5	0	27.9	20.6	13.4
cider/perry	42.2	100	41.2	100	100	100	66.7	100	73.3	80	0	75	53.8	46.7	0	42.4	10.7	15.8	57.1	46.2	0	83.3	100	83.3	4.2	25	7.1	29.4

Source: JRC, Euromonitor International 2022

[1] Frequencies: ● 0%; ● 0.1 to 24.9%; ● 25 to 49.9%; ● 50 to 65.9%; ● 66 to 79.9%; ● 80 to 99.9%; ● 100%.

[2] EU Member States: BE Belgium; BG Bulgaria; CZ Czech Republic; CY Cyprus; DK Denmark; DE Germany; EE Estonia; IE Ireland; EL Greece; ES Spain; FR France; HR Croatia; IT Italy; LV Latvia; LT Lithuania; LU Luxembourg; MT Malta; HU Hungary; NL The Netherlands; AT Austria; PL Poland; PT Portugal; RO Romania; SI Slovenia; SK Slovakia; FI Finland; SE Sweden.

Figure 13. Minimum estimated market shares[1] of products labelled with ingredients (Top), nutritional information (Middle) and energy content (Bottom), by EU Member State[2] and product category. Downward estimates; market real shares of products presenting the information on-label can be higher. All[2] EU Member States included except Cyprus, Malta and Luxembourg.

Ingredients	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	LV	LT	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Alcoholic beverages	38	45.6	35	36.3	16.7	28.6	18.7	36.9	37	24	21.9	15.4	14	28	31.1	41.9	29.8	35.1	32.1	42.1	34.3	13.2	30.2	27.7
Beers	54.8	61.6	47	58.2	23.8	44.4	29.1	78.5	52.2	55	26.3	44	19.8	35.3	43	64.5	40.7	44.4	63.4	49	53.3	16.9	47.6	44.3
RTDs	6.9	1.3	0	0.1	0	21	9.7	0.8	11	11.7	0	0	6.5	9.5	1.8	4.8	0	0	0	23.3	0	1.6	0.8	15
Wine	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1.3	0	0.5	0.2	0.8
Spirits	4.1	0	17	0	0	0	0	0	2.4	7.2	5.4	3.7	0	1.1	8.2	1.1	0	0	8.5	30	0	11.6	0	0
cider/perry	27.6	46.6	14.9	38.7	52.8	29.9	0	54	4.1	0	79.3	0	24.4	39.4	67.2	23.8	6.1	0	73.6	15.3	40.3	0	36.3	20.2

Nutrition	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	LV	LT	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Alcoholic beverages	0	0	0	0	8.8	0	18.6	0.5	0.9	17.6	0	0	0	0	17.9	33.3	0	0	0	0.9	2.1	0	8.8	2.1
Beers	0	0	0	0	12.8	0	28.8	1.9	1.2	40.9	0	0	0	0	24.8	49.8	0	0	0	1	3.1	0	12.9	3.3
RTDs	0	0	0	0	0	0	0	0	7.8	0	0	0	0	0	0	0	0	0	0	0	0	0	0.8	3.3
Wine	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1.6	0	0	0	0	0	0	0.2	0
Spirits	0	0	0	0	0	0	0.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
cider/perry	0	0	0	0	0	0	0	0	1.7	0	0	0	0	0	3.5	14.5	0	0	0	0	0	0	6.9	2.7

Energy	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	LV	LT	HU	NL	AT	PL	PT	RO	SI	SK	FI	SE
Alcoholic beverages	28.3	33.8	29.4	35.8	16	27.5	39	36.2	33.3	22.5	22.3	14	5.1	13.1	24.6	42.3	15.8	37.3	11.3	29.5	29.1	13.2	24.3	16.3
Beers	46	46	38.9	55.6	22.9	42.5	51.2	77.4	48	52	26.8	38.6	7.2	17.1	34.1	64.5	21.1	46.9	22	34	43.8	16.9	36.9	26.9
RTDs	6.9	1.3	0	0.1	0	21	17.5	1.2	7.8	0	0	0	2.3	0	1.3	6.7	0	0	0	0	0	0	0.8	9.8
Wine	1.4	0	0	3.6	0	0	3.9	0	0.5	0	0	0	0	0	0	2.2	0	1.2	0	0	0	0	0.2	0
Spirits	14	1	4.7	8.1	4	0.9	12	11.7	13.2	3.6	0	0.5	1.5	0	1.8	5.1	1.6	2	0	0.9	2.5	0.5	4	0
cider/perry	55	46.6	14.9	38.7	9	29.9	49.3	46.8	4.1	0	79.3	0	24.4	10.6	66.3	18.6	17.9	0	0	3.1	40.3	0	30.9	4.6

Source: JRC, Euromonitor International 2022

[1] Market shares: ● 0%; ● 0.1 to 24.9%; ● 25 to 49.9%; ● 50 to 65.9%; ● 66 to 79.9%; ● 80 to 99.9%; ● 100%.

[2] EU Member States: BE Belgium; BG Bulgaria; CZ Czech Republic; DK Denmark; DE Germany; EE Estonia; IE Ireland; EL Greece; ES Spain; FR France; HR Croatia; IT Italy; LV Latvia; LT Lithuania; HU Hungary; NL The Netherlands; AT Austria; PL Poland; PT Portugal; RO Romania; SI Slovenia; SK Slovakia; FI Finland; SE Sweden.

3 Conclusions

Recent years have seen a renewed discussion on the labelling of ingredients and nutritional information of alcoholic beverages; most recently, the Europe's Beating Cancer Plan ([3]) foresees the publication of a proposal for mandatory labelling of ingredients and nutrition declaration by the end of 2022.

The current report aims to characterise the current situation on the provision of ingredients and nutritional information from a consumers' perspective; what do consumers find on the labels of alcoholic beverages when they purchase them off-trade, and how has this developed over the past years?

The data analysed shows that products newly launched and re-launched between 2018 and 2021 provide this information to varying extents. In the case of **information on ingredients**, 87.5% of beers throughout the EU markets researched provided it, in contrast to only 2% of wines. Ciders and perries were close to the 50% mark, and RTDs were not far (46.9% and 43.4% providing ingredient information, respectively). Twenty-one percent (21.2%) of spirits products presented ingredient information.

These results are confirmed by recent store checks. Eighty-eight percent (87.8%) of the beers sampled via the store checks, presented ingredient information, while it was present on the labels of 54.4% of sampled ciders/perries and 44.3% of RTDs. Spirits carried this information less frequently, on 14.9% of products across the EU, and wines rarely (1.1% of products) provided ingredients information. The store-checks allow for a more refined analysis of the presence of ingredient information, as it was possible to record whether a heading with 'ingredients' or 'ingredient list' was present on the label. This is essential to distinguish mandatory allergen declarations from the voluntary provision of ingredients, which in the case of the launched/re-launched products analyses (via the Mintel database) could not be discerned.

The results on the presence of **nutritional information** on the labels of alcoholic products are also similar in both analyses. In the case of RTDs, nutritional information was found on 15.1% of newly launched or re-launched products, and in 8.5% of sampled products. In the case of beers, nutrient information was present in 9.4% of newly launched and re-launched products, and in 7.7% of sampled products; and for ciders/perries the information was present in 5.4% of new/re-launches while in 3.1% of sampled products. In both spirits and wines nutritional information was rarely present, whether on newly launched/re-launched products (0.9% of spirits, 0.2% of wines) or on the products analysed via store checks (0.2% of spirits, 0.1% of wines).

When focusing on the **presence of energy content as the single nutritional information** provided on the labels, beers carried this information on 16.1% of new/re-launched products, while 43.1% of sampled beers provided energy content as the single nutrition-related information. Similarly, 16.5% of newly or re-launched ciders and perries carried energy only information, whereas 39.1% of sampled products did so. As for RTDs, 7.7% of new/re-launched products carried energy only information, compared to 30.4% of sampled products. Only 0.9% of new/re-launched spirits provided 'energy only' information, but sampled spirits in store checks showed a higher percentage, with 16.6% of spirits carrying such information. In the case of wines, 0.5% of new/re-launches versus 2.3% of sampled products displayed energy content as the single nutritional information.

The differences between both analyses in this case are not surprising. The data collection and scope are clearly different; a continuous collection of newly launched or re-launched products in one case (Mintel GNPD), with very detailed information regarding package characteristics, and a comprehensive field exercise of in-store data collection across the 27 EU Member States of a large sample of alcoholic products. There may also be differences due to the different time frames; newly launched or re-launched products during the period 2018-2021 in one case, and a two-phase store-check exercise between July and September 2021 (3 EU Member States) and October and December 2021 (the remaining 24 EU Member States). New launches and re-launches may hint to the innovations in a certain market, but are not representative of the market size or of shares of specific products and do not necessarily persist on the market.

Market share is another kind of indicator, as different brands account for different shares of the total market. When we sample individual products we do not account for how frequently they are sold, for the market volume they represent. The market share estimates per EU Member State are probably more representative of the real landscape that consumers encounter when purchasing alcoholic beverages, even if they are conservative estimates accounting only for the minimum market shares of labelled products. These estimates can be used as the baseline situation of information provision to consumers on labels of alcoholic beverages in 2021.

In that sense, it is clear that beers and ciders/perries are the categories with highest market shares of products labelled with ingredients and with energy information. To a lesser extent, these categories also

display nutrition information more frequently at market share level. RTDs and spirits fare similarly, with varying presence in market shares of ingredients and energy content, and very low presence of nutritional information. Wines labelled with ingredients, energy content, or nutrition information have the lowest market shares across the EU Member States.

Off-label provision of ingredients and nutritional information, in the form of QR codes or website links that actually direct the consumer to such information, is so infrequent that at this point its contribution to consumer information seems negligible.

List of figures

Annexes

Annex 1. Mintel Categories of Alcoholic Beverages, Launch Types, and Labels (retrieved from https://www.gnpd.com)

A.1) Alcoholic Beverages

Beers: Includes all beer types: ales, stouts, lagers, light beer, flavoured beer and specialty beers made from different ingredients like lemongrass or blueberry. Also includes diluted beers.

Brandy: it is a spirit usually distilled from wine or fruit. This includes cognac, grappa, calvados and armagnac. Also included is flavoured brandy.

Cider: Includes cider (alcoholic drink made from apples), perries (an alcoholic beverage made of fermented pear juice), and hard ciders. These products must be alcoholic in nature unless a non-alcoholic version of the drink.

Dark Rum: it is a spirit usually distilled from fermented juices of sugar cane, sugar cane syrup, sugar cane molasses or other sugar cane by-products. The Dark Rum subcategory includes aged rum, spiced rum and some flavoured rums.

Flavoured Alcoholic Beverages (FABs): Referred to as alcopops, malteratives/malt beverages, and packaged pre-mixed alcoholic drinks. Includes wine coolers, pre-packaged spirit and mixer drinks like gin and tonic, tequila and juice, rum and cola, etc. Also includes hard soda and seltzer. [Throughout this report, the term ready-to-drink products (RTDs) has been used for consistency].

Fortified & Other Wines: This includes all types of fortified wine such as sherry, port, madeira and vermouth. Also included are sake and all rice wines, pulque (cactus wine), mead (honey wine), pomace wine and fruit wines from fruits other than grapes, apples or pears; mulled wine and similar versions.

Gin: it is a spirit usually made from grains and juniper berries. This includes London dry gin and flavoured gin.

Liqueur: it is an alcoholic drink usually sweetened and flavoured with fruit, spices or herbs. All liqueurs and flavoured liqueurs are included. If the liqueur is spirit based, such as rum liqueur or tequila liqueur, then the product is categorised here. Also includes bitter liqueurs.

Other Spirits: This includes all spirits that do not fall into one of the other spirit sub-categories. Combinations or blends of different types of spirits are included, for example vodka-cognac. Multi-packs containing spirits or liqueurs from multiple sub-categories are categorised here.

Tequila: it is a spirit usually made by fermenting and distilling the sap or fermented juice of the agave plant. This includes aged tequila, rested tequila, white tequila and flavoured tequila.

Vodka: it is a spirit usually made from potatoes, grain or sugar beet molasses. This includes flavoured vodka.

Whisky: it is a spirit usually distilled from fermented grains aged in wood casks. This includes malt whisky, aged whisky, scotch, bourbon and flavoured whisky. Whisky may also be spelt whiskey.

White Rum: it is a spirit usually distilled from fermented juices of sugar cane, sugar cane syrup, sugar cane molasses or other sugar cane by-products. The White Rum subcategory includes white rum and some flavoured rums.

Wine: This includes sparkling wine and champagne, prosecco, cava. However, it excludes the following: sherry, port, madeira and vermouth, sake and all rice wines, pulque (cactus wine), mead (honey wine), pomace wine and fruit wines from fruits other than grapes, apples or pears, mulled wine and similar versions. Cooking wines (which are specific for cooking) are categorised in Cooking Sauces.

A.2) Launch type

New Product: This launch type is dependent on the Brand field. It is assigned when a new range, line, or family of products is encountered. This launch type is also used if a brand that already exists on GNPD, in one market, crosses over to a new sub-category.

New Variety/Range Extension: This launch type is dependent on the Brand field. It is used to document an extension to an existing range of products on GNPD.

New Packaging: This launch type is determined by visually inspecting the product for changes, and also when terms like New Look, New Packaging, or New Size are written on the pack.

New Formulation: This launch type is determined when terms such as New Formula, Even Better, Tastier, Now Lower in Fat, New and Improved, or Great New Taste are indicated on pack. Mintel does not look at the ingredient list to determine a new formulation.

Re-launch: This launch type is determined when specified on pack, via secondary source information (trade shows, PR, websites, and press) or when a product has been both significantly repackaged and also reformulated. If a product is reformulated and also repackaged then this launch type is selected.

A.3) Private label

Private label: Private label products are those manufactured by one company for sale under another company's brand. Typically, the retailer's or wholesaler's name are mentioned on the packaging.

Branded: products manufactured and sold by specific brands

Annex 2 – Criteria Developed for the Classification of Ingredients and Nutrition Information On-Label

	YES	NO
Ingredients	Ingredients are present	No information on ingredients is present If allergens are declared following e.g. the word 'contains' or 'with'(1), the information is NOT a list of ingredients
Energy	Energy information in kcal and/or kJ is present	No information on energy is present
Nutrition	When information related to the following elements is present: energy, [total] fat, saturates [saturated fat], carbohydrate, sugars, protein and salt	This nutritional information is not present

(1) We have observed this appearing even if it is not complying with FIC Regulation.

Source: JRC elaboration

GETTING IN TOUCH WITH THE EU

In person

All over the European Union there are hundreds of Europe Direct centres. You can find the address of the centre nearest you online (european-union.europa.eu/contact-eu/meet-us_en).

On the phone or in writing

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

— by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),

— at the following standard number: +32 22999696,

— via the following form: european-union.europa.eu/contact-eu/write-us_en.

FINDING INFORMATION ABOUT THE EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website (european-union.europa.eu).

EU publications

You can view or order EU publications at op.europa.eu/en/publications. Multiple copies of free publications can be obtained by contacting Europe Direct or your local documentation centre (european-union.europa.eu/contact-eu/meet-us_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex (eur-lex.europa.eu).

Open data from the EU

The portal data.europa.eu provides access to open datasets from the EU institutions, bodies and agencies. These can be downloaded and reused for free, for both commercial and non-commercial purposes. The portal also provides access to a wealth of datasets from European countries.

The European Commission's science and knowledge service

Joint Research Centre

JRC Mission

As the science and knowledge service of the European Commission, the Joint Research Centre's mission is to support EU policies with independent evidence throughout the whole policy cycle.

EU Science Hub

ec.europa.eu/jrc

@EU_ScienceHub

EU Science Hub - Joint Research Centre

EU Science, Research and Innovation

EU Science Hub

Publications Office
of the European Union