

**BRCGS** | Free-From

**Two in demand  
labels to grow your  
market**

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Head of Standards BRCGS**



# Who is BRCGS?

Brand Reputation Compliance Global Standards

Leading brand and consumer protection organization

Over 30,000 certified sites in 130 countries

Standards across the supply chain: Food, Packaging, Storage & Distribution, Agents & Brokers, Consumer Products, Retail, Ethical, Plant-Based, Gluten-Free

We can help guide you through certification and meeting compliance.

[www.brcgs.com](http://www.brcgs.com)



**BRCGS** | Free-From

# 2 in demand labels –Free From...

Free From Gluten



Free From Animal - Plant Based



## What is 'Free-From'?



Free-From foods are manufactured and targeted specifically at consumers who suffer from a food intolerance, allergy or food-related autoimmune condition. They are also becoming popular for consumers following selective avoidance diets.

This includes food which is 'plant-based' and free from animal derived products, or food that is gluten-free.

# What is Plant-Based?

- “Plant-Based” refers to products which are free from animal-derived ingredients.
- Plant-Based products are defined as products that do not intentionally contain materials of animal origin (ingredients, additives, carriers, flavourings and enzymes, processing aids, etc.)
- Adopting to a “Plant-Based” diet does not necessarily mean going “vegan”.



# Plant Based Market Insight

<https://youtu.be/1BkULIOUjyY>

# The plant-based drivers...



**Plant-based trends a step-change in the global food and beverages sector.**

**Consumer beliefs rapidly evolving around the world, with more people motivated to adapt to plant-based diets.**

**Numerous reasons, the 4 main plant-based factors will be covered today.**

**Food and beverage businesses need to learn from these plant-based trends – align with a set of global standards**

- **improve supply chain assurance and**
- **gain consumer confidence in a market that is already confusing.**

# The 4 plant-based factors food and beverage companies need to consider



**Increasing investment in plant-based food technology companies**

**Animal welfare pushing plant-based trends**

**The influence of Climate Change**

**Plant-based trends are ultimately decided by consumers**



# Increasing investment in plant-based food technology companies



In 2019, venture capital funding in fermentation companies achieved \$274 million.

The first seven months of 2020, this figure increased by over 58% to \$435 million

Agri-food tech acquired \$26 billion investment in 2020.

# Animal welfare pushing plant-based trends



The underlying reasons pinpointed to societal and geopolitical issues

# The influence of Climate Change



## Animal-based

Beef (meat herd) – 59.6 kg CO<sub>2</sub>eq

Lamb and mutton – 24.5 kg CO<sub>2</sub>eq

Cheese – 21.2 kg CO<sub>2</sub>eq

Beef (dairy herd) – 21.1 kg CO<sub>2</sub>eq

## Plant-based

Soybean (Brazil) – 5.kg CO<sub>2</sub>eq

Tofu – 3kg CO<sub>2</sub>eq

Quorn – 1.3kg CO<sub>2</sub>eq

Peas – 0.8 CO<sub>2</sub>eq

# Plant-based trends are ultimately decided by consumers



Consumers increasingly consider factors such as health, sustainability, and social impact in making their food decisions.<sup>52</sup> A recent poll indicates that 66% of consumers [in the U.S.] are reducing consumption of at least one type of meat.<sup>53</sup>

(The Good Food Institute, 2019, p. 55)

(The Good Food Institute. (2019): 2019 U.S. State of the Industry Report Plant-Based Meat, Eggs, and Dairy. Report. USA. Retrieved from <https://www.gfi.org/industry>)\*

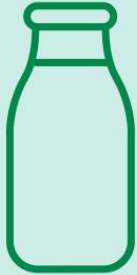




# Consumer motivators for adhering to a Plant-Based diet



- Ethical/environmental motivators
  - Animal advocacy against cruelty
  - Eating a meatless diet decreases your carbon footprint
  - Lack of available land due to population increase
- Health benefits
  - Helps prevent heart disease
  - Weight management
- Social media influence
  - Consumers research, share knowledge and have created a culture around Plant-Based or Vegan diets

# Plant-Based market sales growth:

**Top 5 Plant-Based Products sold in the U.S.”** (The Good Food Institute, 2019, p. 36)

<b>2019 Sales</b> (values in 000's)	<b>\$2.016,540</b>	<b>\$939,259</b>	<b>\$376,972</b>	<b>\$335,549</b>	<b>\$286.662</b>
<b>\$ Sales Growth</b> (2017-2019)	<b>14.2%</b>	<b>37.8%</b>	<b>25.5%</b>	<b>33.9%</b>	<b>92.6%</b>
					
<b>Plant-Based Milk</b>	<b>Plant-Based Meat</b>	<b>Plant-Based Meals</b>	<b>Plant-Based Ice Cream &amp; Frozen Novelty</b>	<b>Plant-Based Creamer</b>	

(The Good Food Institute. (2019): 2019 U.S. State of the Industry Report Plant-Based Meat, Eggs, and Dairy. Report. USA. Retrieved from <https://www.gfi.org/industry>)\*

# Projected International growth for Plant-Based food sales

UK

Plant-based sales were £572m and are set to **increase** to £658m by 2021

Asia

Research predicts, China's vegan market will **grow** more than **17%** between 2015 and 2020; **22%** of Hong Kong residents follow a plant-based diet

EMEA

Is a **leading** region with a **39%** market share driven by strong growth in Germany, Italy and the UK.

Australia

Australia is the **third-fastest growing vegan market** in the world. Grew 92% in plant-based food product launches in 2014-2016. Set to reach \$215 million by 2020.



Free-From

# Projected International growth for Plant-Based food sales

## North American Market Consumer Demand

- In 2016, 25% of Canadian consumers stated that they try to limit the amount of red meat they eat; 8% identified as vegetarian or mostly vegetarian.
- 17% of U.S. consumers aged 15 to 70 currently claim to eat a predominately plant-based diet, while 60% report to be cutting back on meat-based products.
- Sales of plant-based foods jumped 20% in the past year to more than \$3.3 billion





# What brands need to consider when producing plant-based foods

- Consumers don't trust products that simply indicate being plant-based
- The trademark is a tool for consumers to trust the brand and make it easy to scan the label
- Buying decisions are impacted by 3<sup>rd</sup> party verification
- Brand owners want to build trust with consumers using a trademark; Sites have an opportunity to differentiate themselves from their competition



[Read our Whitepaper](#)

[How a universally recognised Plant-Based standard delivers consumer and brand confidence](#)

# BRCGS Free-From Standards



**Improving Brand Confidence:** BRCGS has a heritage in retail and now nearly 30,000 suppliers use our products for quality and safety assurance.

**Improving Consumer Confidence:** Building on Gluten-Free, BRCGS has developed a Plant-Based product to inform consumer choice.

**Brand Risk Mitigation:** Using credible 3rd party verification that a product has been produced at a site that has implemented a robust management system.

# Overview of the Plant-Based Standard Requirements

- **Commitment to the Program**

- Senior Management Commitment
- PBMS maintenance and reassessment

- **Plant-Based Finished Product Integrity**

- Product development
- Approval and control of labels
- Product authenticity, claims and chain of custody
- Marketing claims
- Cross contamination control
- Control of recipes and formulation
- Segregation and disposal of obsolete and waste material
- Plant-based awareness training

- **The Food Safety Plan – HACCP**

- **The Plant-Based Management System**

- Documentation and Records
- Supplier and ingredients/inputs approval and performance monitoring
- Ingredient and input receipt and acceptance
- Suppliers of Services
- Specifications
- Traceability
- Complaint handling
- Product Recall and Withdrawal
- Internal Audits

# A specialized standard to pair with Food Safety

The Plant-Based Global Standard is unique to traditional certification processes. You can combine a Plant-Based audit with any GFSI benchmarked standard audit or Global Markets Program audit to achieve certification (does not have to be BRCGS Food Issue 8).

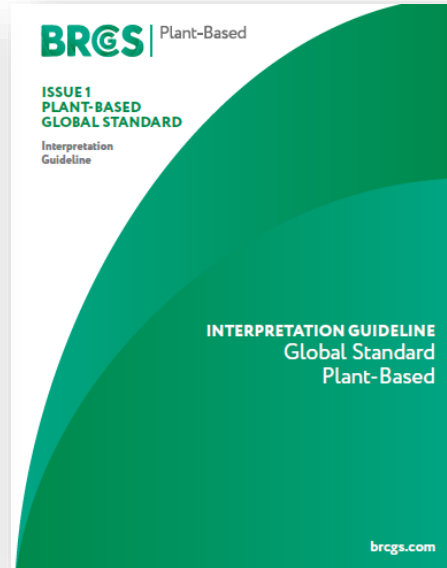


# Supporting Information

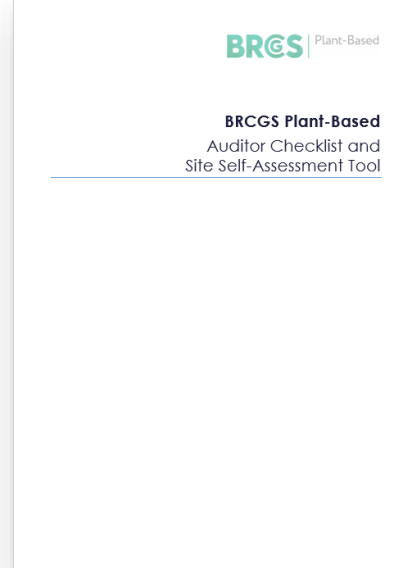
Quick Start Guide



Interpretation Guide



Self-Assessment Checklist



Schedule A

Trademark Approval Form

Schedule A Guidance Document

Trademark Guidelines



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Free From Gluten

# What is Gluten?

Gluten is a protein from a grain or a hybridized strain found in the following:

- Barley
- Rye
- Wheat
- Triticale
- Kamut
- Or any modified gluten protein, or protein fractions that are derived from any of the above cereals or hybrid.



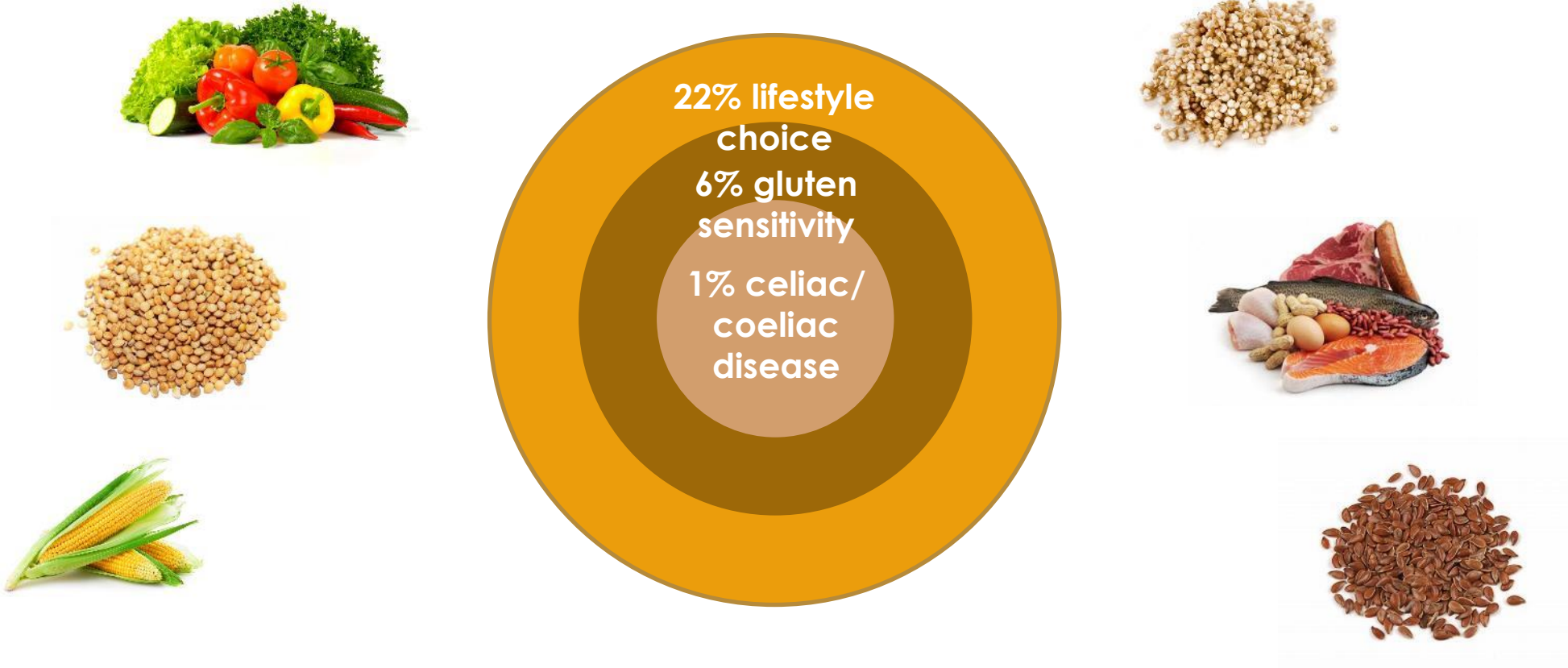
# Market Insight

[\\_Gluten-Free Certification Programme Overview-1080p-210320.mp4](#)



# The Gluten-Free Consumer Market is Broad

1 in 3 consumers are avoiding or reducing gluten in their diet daily





# What's The Need

- Prevalence of Coeliac Disease
- More than 300 symptoms
- 83% mis-diagnosed
- Some sufferers show no symptoms
- Non-coeliac Gluten Sensitivity

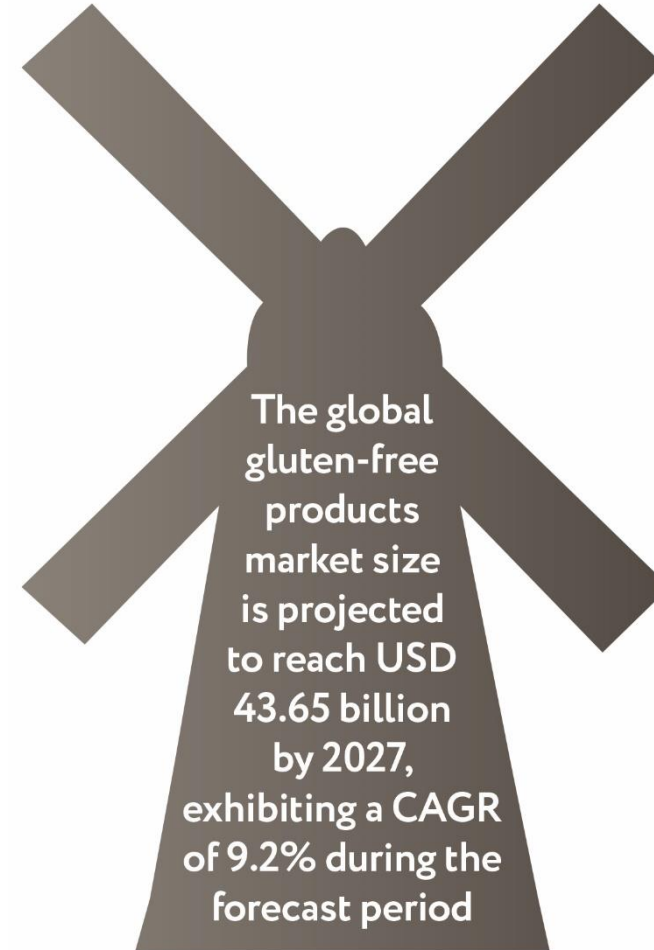


# Market Insight

The global gluten-free products market size was estimated at USD 21.61 billion in 2019 and is expected to expand at a CAGR of 9.2% during the forecast period of 2020 to 2027. Factors such as the rising prevalence of diseases occurring owing to unhealthy lifestyles increased awareness regarding healthy diets, and prevention of health disorders, such as heart diseases, diabetes, stroke, obesity, chronic pulmonary disease, metabolic syndrome, are expected to drive the growth.

Source: (Grand View Research (2020): Gluten-Free Products Market Size, Share & Trends Analysis Report By Product (Bakery Products, Dairy/Dairy Alternatives), By Distribution

Channel (Grocery Stores, Mass Merchandiser), By Region, And Segment Forecasts, 2020 - 2027. Retrieved from <https://www.grandviewresearch.com/industry-analysis/gluten-free-products-market>



Source: (Grand View Research (2020): Gluten-Free Products Market Size, Share & Trends Analysis Report By Product (Bakery Products, Dairy/Dairy Alternatives), By Distribution Channel (Grocery Stores, Mass Merchandiser), By Region, And Segment Forecasts, 2020 - 2027. Retrieved from

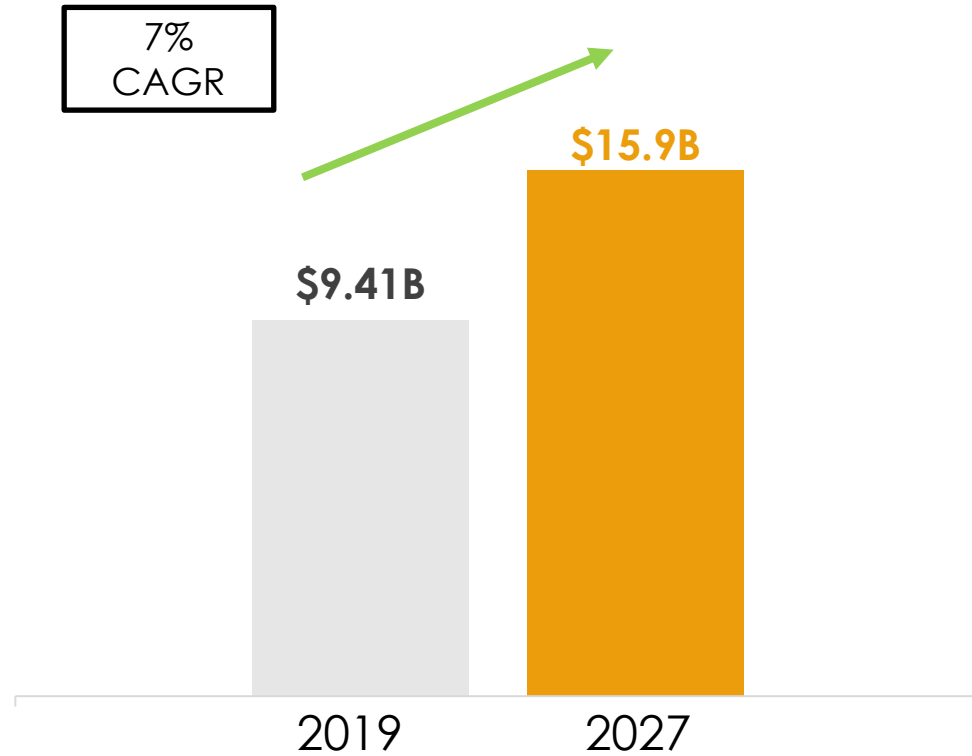
<https://www.grandviewresearch.com/industry-analysis/gluten-free-products-market>

# Market Insight

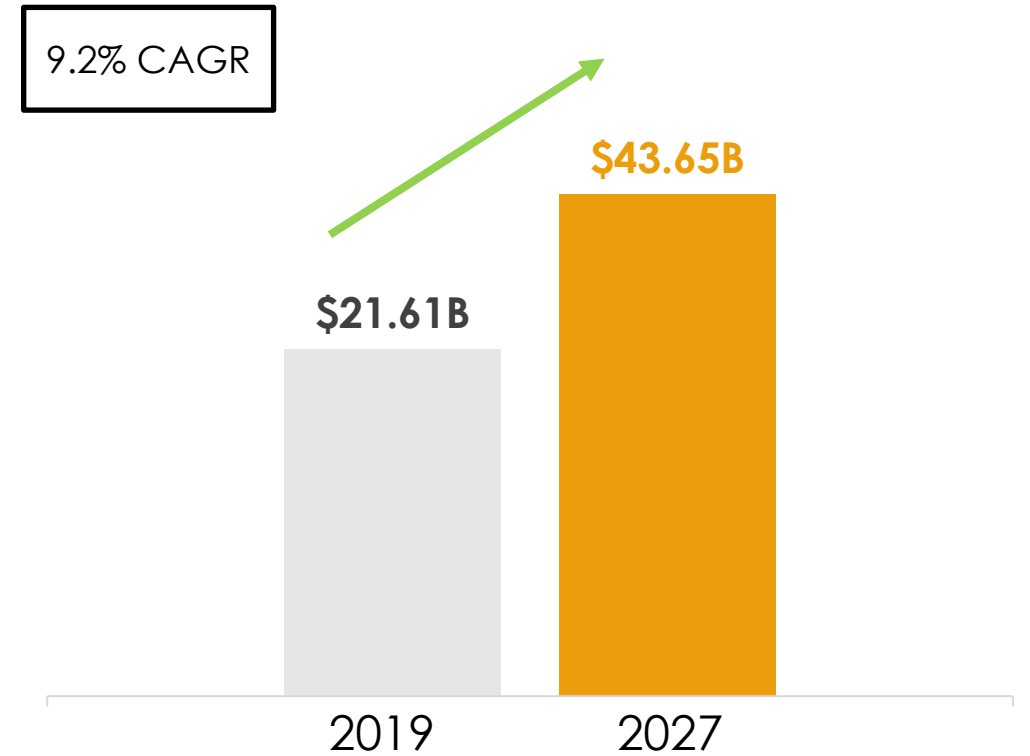


# The Market Is Projected to Grow Exponentially

## Global Food Certification Market Growth



## Global Gluten-Free Product \$ Sales Growth





Why was the Gluten-Free Certification Program developed?

**BRCS** | Gluten Free

# Overview of the GFCP Requirements

- Senior leadership commitment
- Prerequisite programs
- HACCP principles
- Records
- Document control
- Validation
- GFMS maintenance and reassessment
- Internal audits

## Gluten controls

- Gluten awareness training
- Product development
- Supplier approval, purchasing, and incoming ingredients and inputs
- Approval and control of labels
- Marketing claims
- Finished product specifications
- Contamination control
- Work in progress
- Segregation and disposal of obsolete and waste material
- Laboratory and testing
- Complaint handling
- Recall



# Methodology



- Built on recognised accredited standards, verified by third-party trained food auditors and certified by licenced certifying bodies
- Regarded as the method of choice (gold standard) for ensuring gluten-free and free from products, to ensure food integrity and to remove risk of cross-contamination
- BRCGS Free From Standards designed to meet or exceed global regulations (non-prescriptive)

# Methodology



- Combines efficiently with existing food safety systems (i.e. GFSI) and recognised preventative, food-safety approaches for managing production of free-from products
- Qualified suppliers fully visible on BRCGS Directory
- Reduced cost and risk of product failure related to dependence on product testing. Right first time approach.

## Intentional Addition

- There are strict laws in most countries related to the labelling of gluten in products.
- No Intentional Addition of Gluten
- Start Clean, Stay Clean



# No Gluten Threshold Requirement

- Product must meet regulatory requirements
- Lower threshold limits acceptable
- “Gluten-Free” means it meets the GFCP Requirements



# Benefits for Brand Owners



- Providing customers with informed and safe choices
- Brand protection and consumer trust
- Brand differentiation
- Recognised on-pack consumer trademarks
- Recognised consumer group endorsements drive purchase decisions
- Market-readiness for consumer behavioural change

# Labelling food and consumer trust

- Consumers don't trust labels alone that merely suggest a product is 'free from'.
- Brand owners need to build trust with consumers
- Consumers will drive demand for free-from products
- The use of an on pack trademark is a tool for consumers to develop trust in a brand by a quick label scan
- The **Plant-Based Standard** and **Gluten-Free Certification Programs** are B2C initiatives that offer a trusted trademark on branded packaging.





## Types of Audits

- Standalone Audit
- Combined Audit

## Audit Duration

- Typical duration for a stand-alone is 1.5 – 2 days.
- When combined with a GFSI audit, the GFCP adds 0.5 days.

# A specialized standard to pair with Food Safety

The GFCP is unique to traditional certification processes. You can combine a Gluten-Free audit with any GFSI benchmarked standard audit or Global Markets Program audit to achieve certification (does not have to be BRCGS Food Issue 8).





# Brands we are already working with

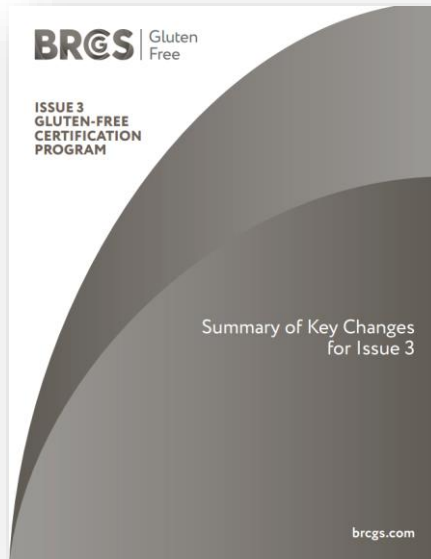


# Supporting Information

## Quick Start Guide



## Summary of Key Changes in issue 3



## Self-Assessment Checklist



## Schedule A

## Trademark Approval Form

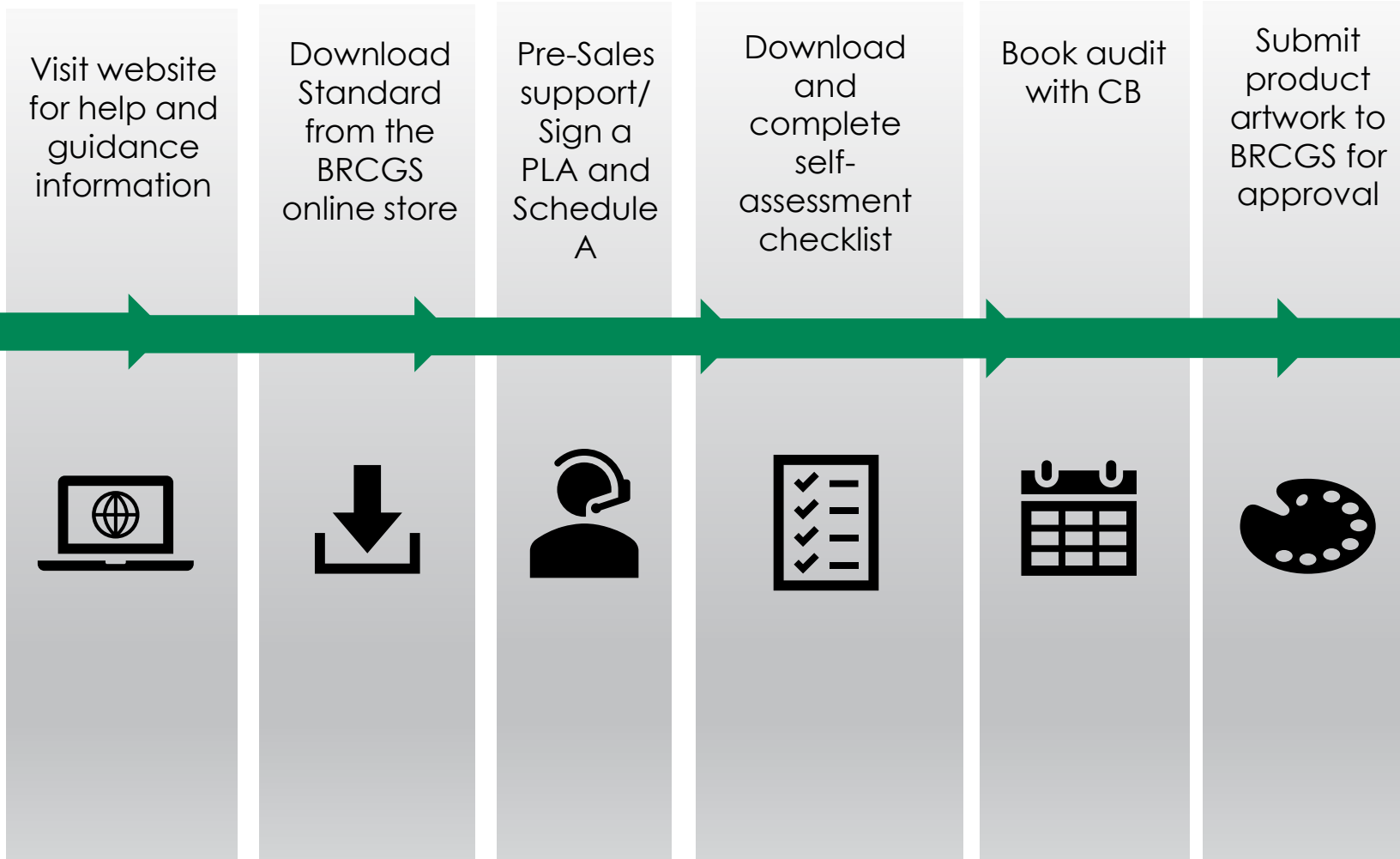
## Schedule A Guidance Document

## Trademark Guidelines



# Next Steps

← Post-certification Year 1 →



← Pre-certification →

Benefit from all-inclusive service package in order to support continuous improvement



- BRCGS Professional** Register for learning
- BRCGS Directory** Listing on supplier shop window
- BRCGS Participate** Reports to benchmark performance with competitors
- Insight reports Subscription for all technical content
- Food Safety Culture Excellence An introductory culture model
- Logo License License to use the BRCGS Logos
- Technical support Access to technical team

**BRCGS**

GLOBAL STANDARD

**GLUTEN-FREE  
CERTIFICATION  
PROGRAM**



VERSION 3

## Learn and Implement

Learn about the program by visiting our website.

[brcgs.com/our-standards/gluten-free-certification-program/](https://www.brcgs.com/our-standards/gluten-free-certification-program/)

[sales@brcgs.com](mailto:sales@brcgs.com)

**BRCGS** | Gluten Free



## Further Resources

- GFCP Industry Training on the Store - [brcgs.com/store/](https://brcgs.com/store/)
- GFCP Help, Guidance and Resources on the GFCP pages of the BRCGS website – [brcgs.com](https://brcgs.com)
- Participate – Access other BRCGS Standards’ materials
- Directory – Search for a CB or for a GFCP-certified site
- Educate – Complete the GFCP Industry Training E-Learning Course and Exam online



## Further Resources

- Sales – [sales@brcgs.com](mailto:sales@brcgs.com)
- Directory – [submissions@brcgs.com](mailto:submissions@brcgs.com)
- Enquiries – [enquiries@brcgs.com](mailto:enquiries@brcgs.com)
- Training – [training@brcgs.com](mailto:training@brcgs.com)
- Recalls and Withdrawals – [compliance@brcgs.com](mailto:compliance@brcgs.com)
- Get the Trademarks – [labels@brcgs.com](mailto:labels@brcgs.com)



# Trademark Use and Label Approvals

- BRCGS Free-From Trademark Guideline
- Trademark Approval Form
- Schedule A
- <https://www.brcgs.com/our-standards/gluten-free-certification-program/benefits/>
- Labels / artwork in PDF to [labels@brcgs.com](mailto:labels@brcgs.com)

# Training

- Available as E-Learning on the BRCGS [Bookshop](#)
- Plant-Based - [Sites Training](#)
- Plant-Based – [Auditor Training](#)
- Gluten-Free Certification Program - [Sites Training](#)
- Gluten-Free Certification Program – [Auditor Training](#)

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BRCGS Digital Training.  
Set the standards.

START TODAY



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Be brave,  
Be clear, and  
Go for it.

Explore professional development opportunities with BRCGS.

START TODAY



**Thank you.**