





***Science Free***

*How Labels are Deceiving Consumers  
and Undermining Palm Oil Reputation*

*Free From Palm Oil Goods are Unsustainable*

# **Preface - The Long Journey**

Promoting the Right to **choose** and use palm oil

A Commercial war has undermined PO reputation

The Free From Palm oil:

- is healthier
- is more sustainable
- is more lucrative - commercially convenient

giacomo



# **Chapter 1 - The Commercial War**

We all are aware...

...but...there's something more dangerous  
because it's silent

# Chapter 2 - Reputation

# Worst Oil for Health

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	ITALY	FRANCE	SPAIN	GERMANY
<b>Palm Oil</b>	<b>25 ▲</b>	<b>40 ▼</b>	<b>46 ▲</b>	20 ▲
Lard	23	10	12	<b>29</b>
Margarine	10	9	5	11
Butter	10	11	5	11
Rapeseed Oil	8	1	14	2
Sunflower Oil	1	3	1	2

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# Worst Oil for Health

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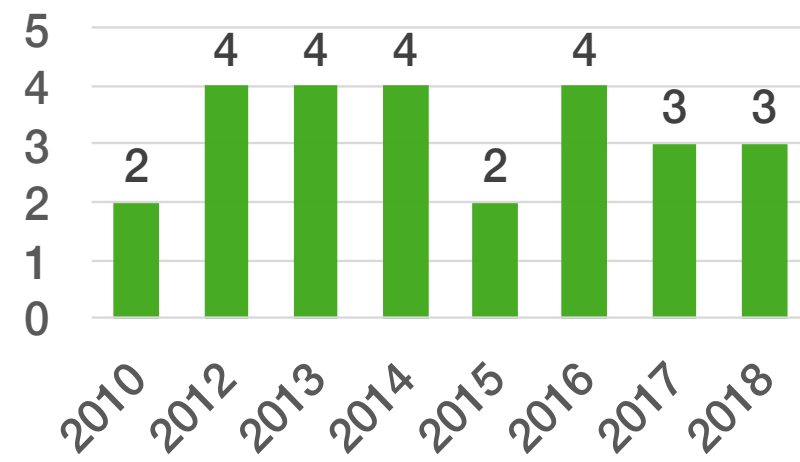
	USA	CANADA	UK	AUSTRALIA
<b>Palm Oil</b>	2	9	6 ▲	10 ▼
Lard	<b>31</b>	<b>28</b>	<b>36</b>	<b>28</b>
Margarine	16	16	11	28
Butter	16	14	14	15
Rapeseed Oil	1	4	1	3
Sunflower Oil	1	1	1	4

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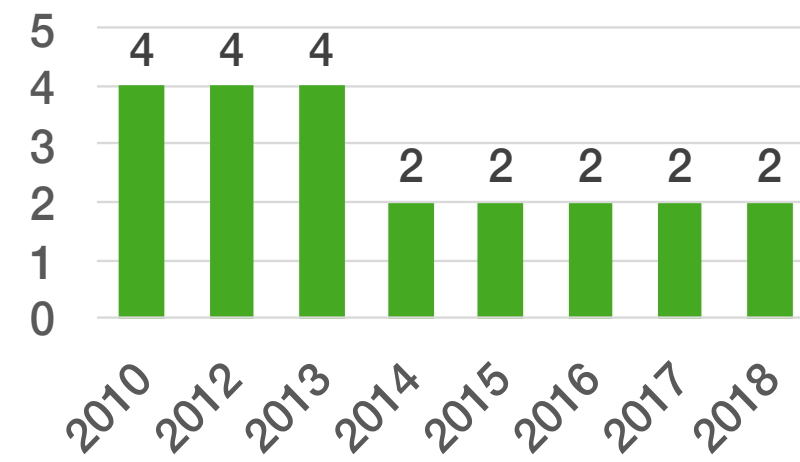
# Health: Trend in Perception

**GOOD**

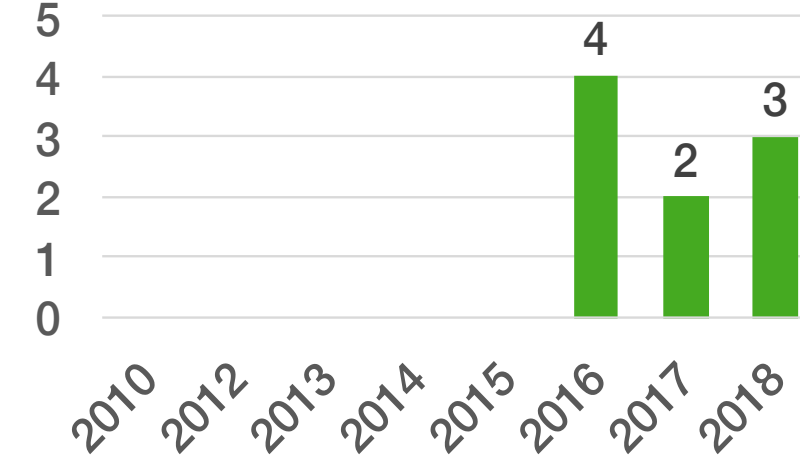
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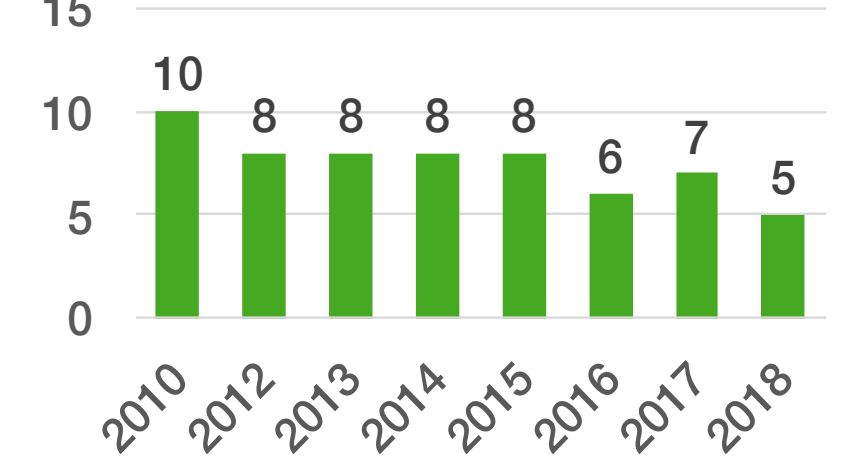
## FRANCE



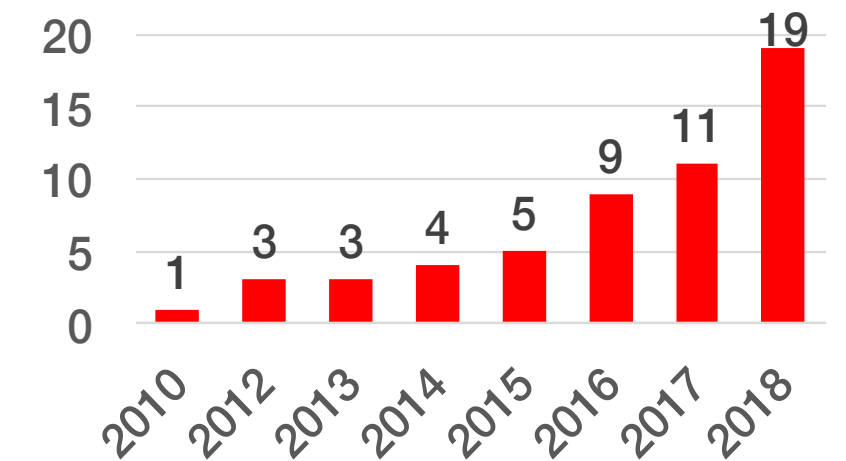
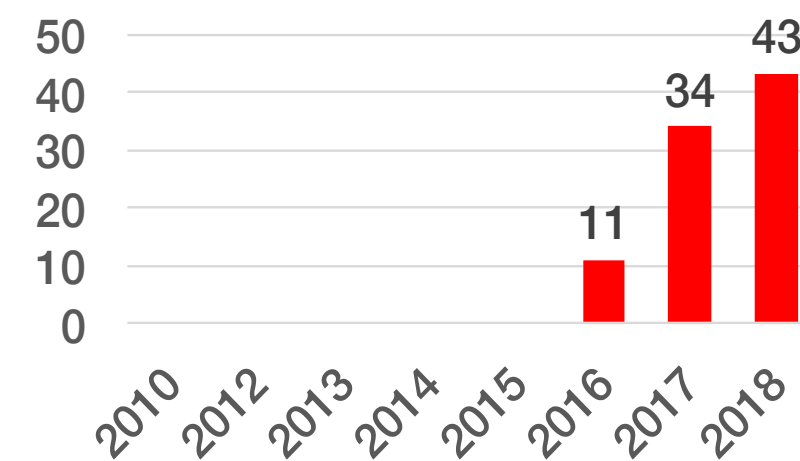
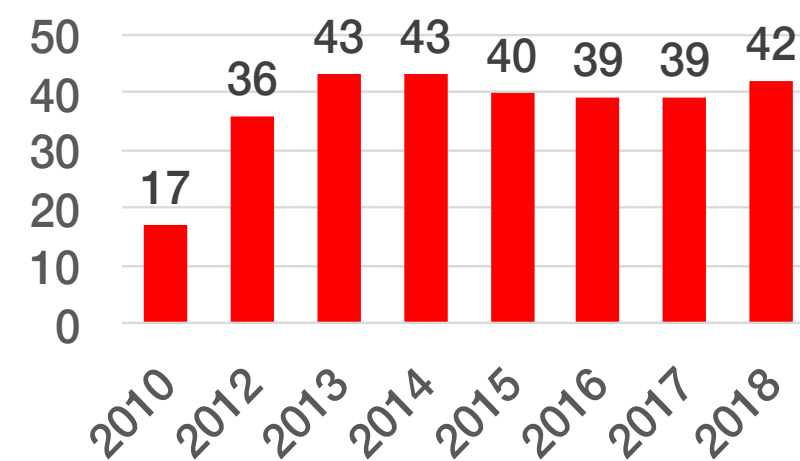
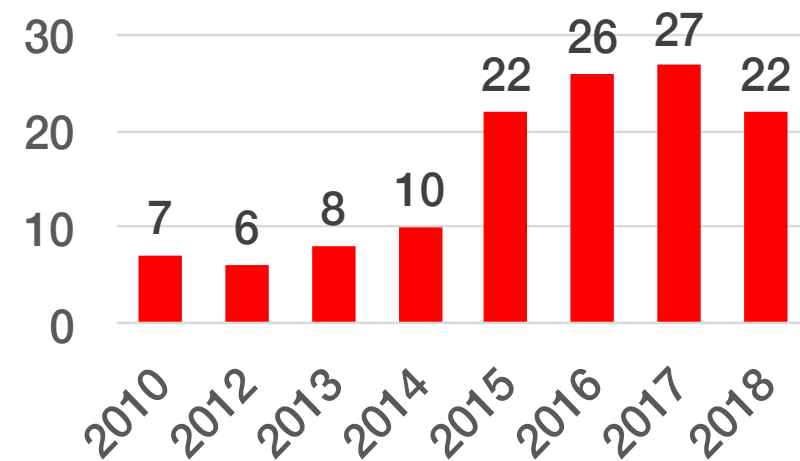
## SPAIN



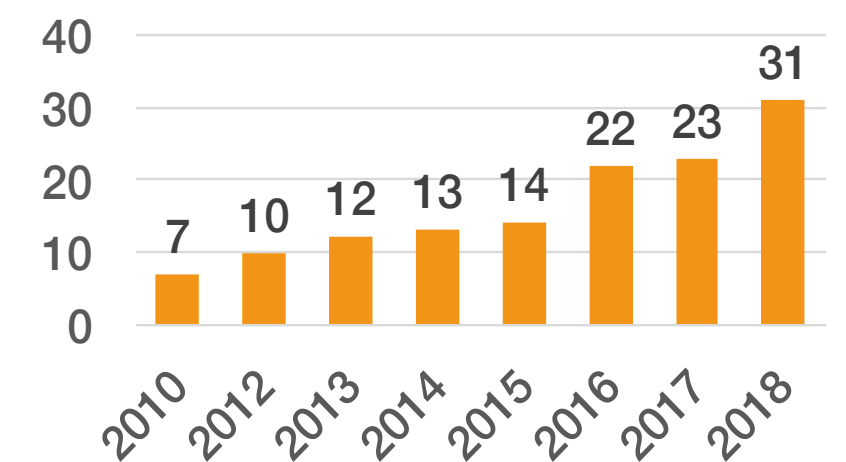
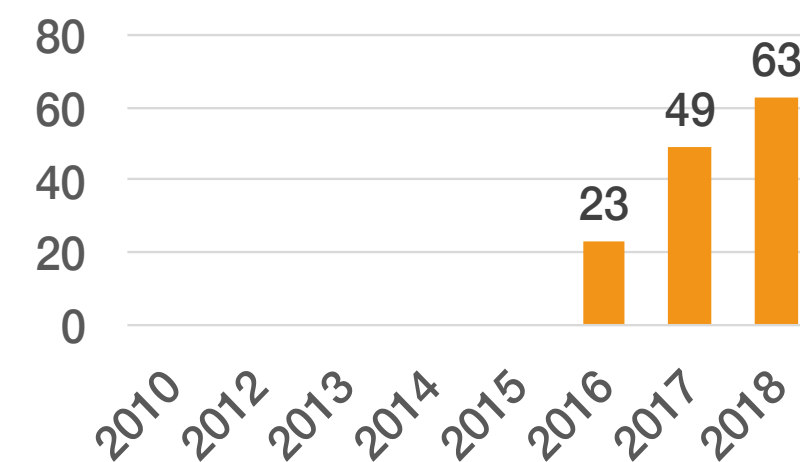
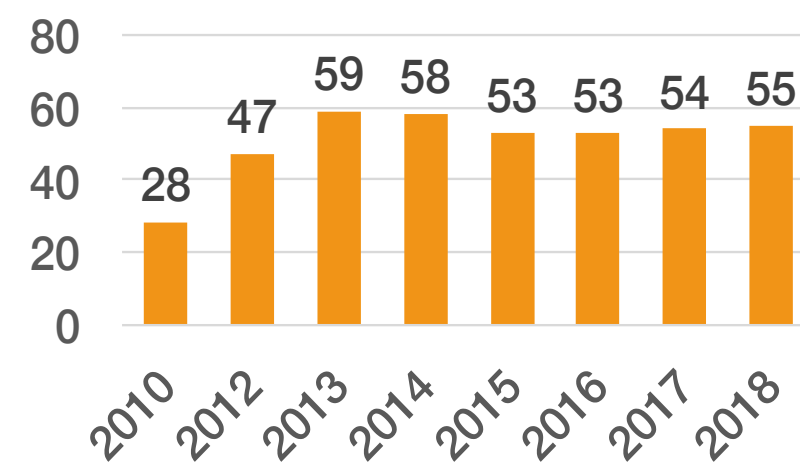
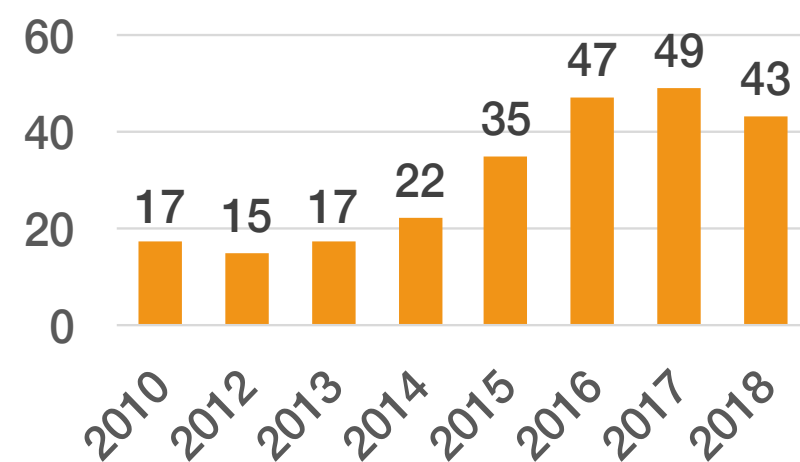
## GERMANY



**WORST**



**BAD**



# Health: Trend in Perception

ITALY

FRANCE

SPAIN

GERMANY

**GOOD**

**WORST**

**BAD**

# Health: Why the Worst?

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	ITALY	FRANCE	SPAIN	GERMANY
Read/Heard	29	26 ▲	<b>35</b> ▲	29 ▲
Harmful/bad	<b><u>19</u></b> ▼	13 ▲	11 ▼	10 ▼
Cancerogenous	8 ▼	5 ▲	<b><u>10</u></b> ▲	4 ▼
Harmful Fats	8 ▼	13	12 ▼	<b><u>16</u></b> ▼
Deforestation	4 ▲	<b><u>13</u></b> ▲	3 ▲	6 ▲

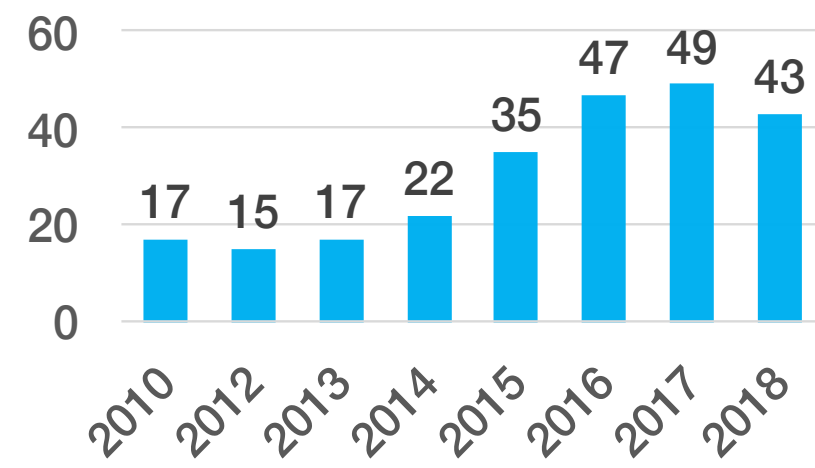
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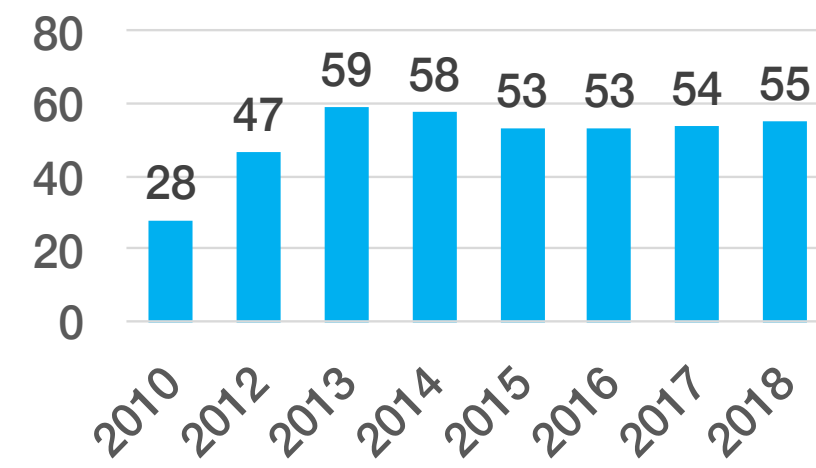
# Summary: Trend Negative Perception

HEALTH

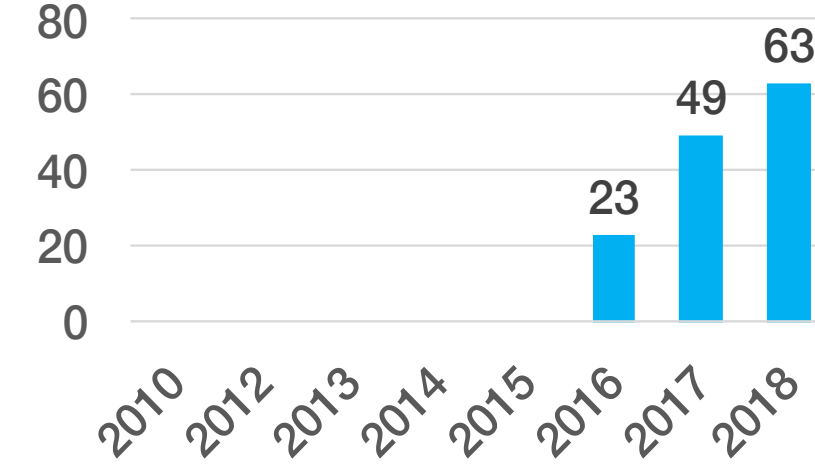
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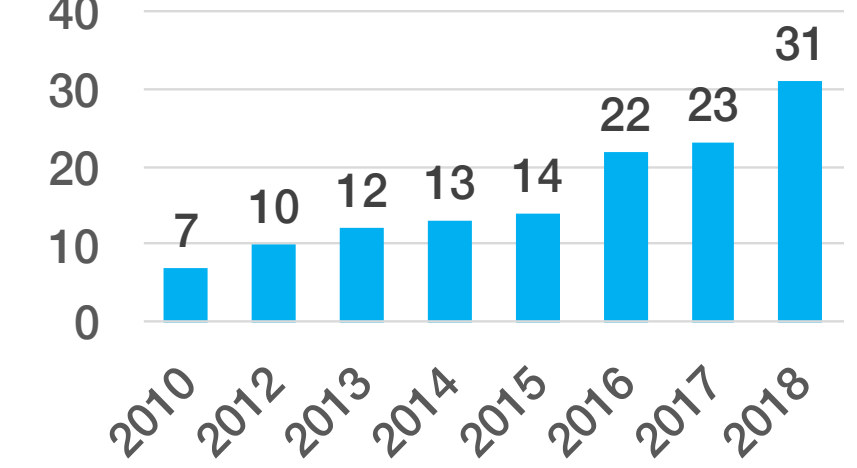
## FRANCE



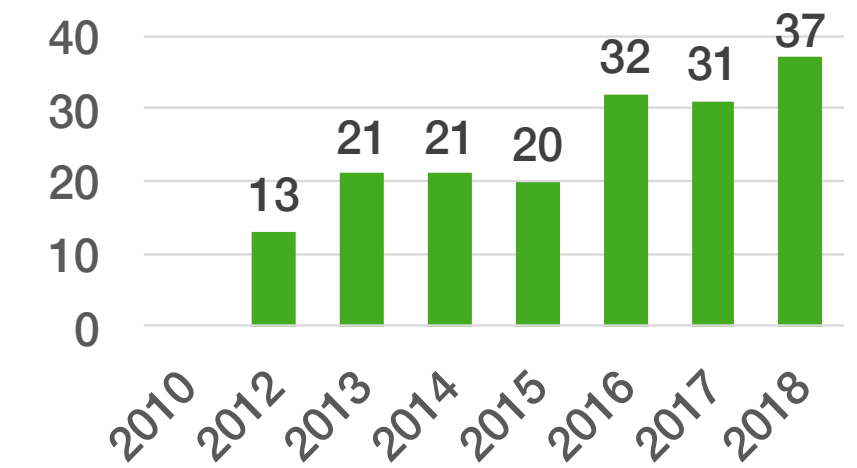
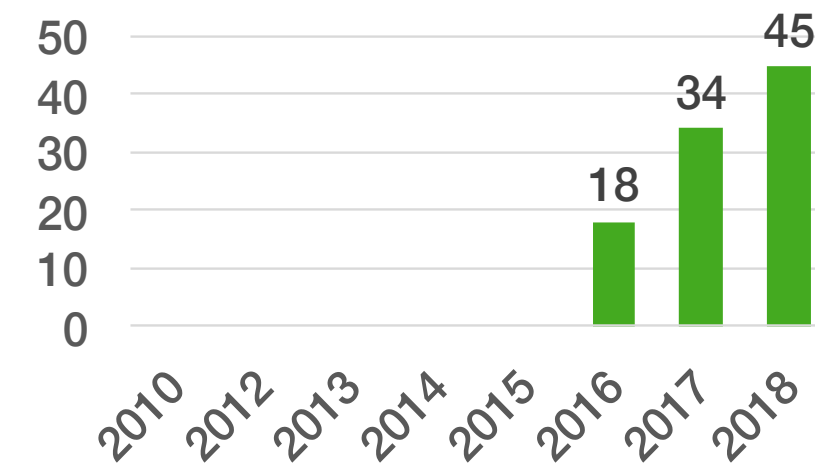
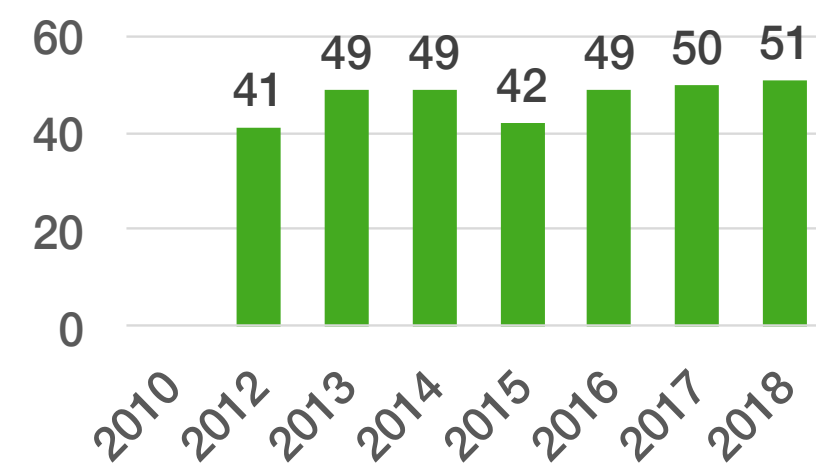
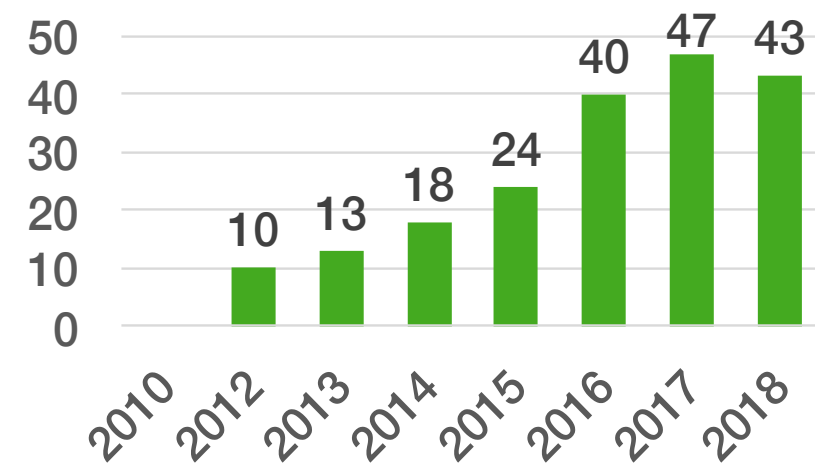
## SPAIN



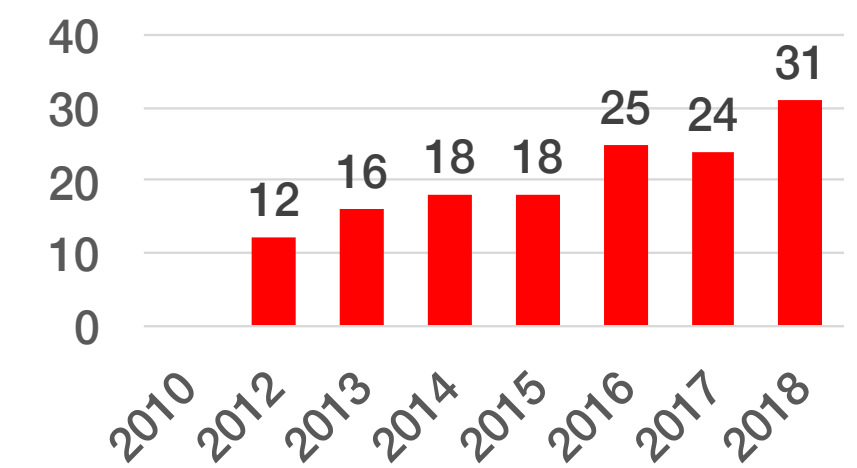
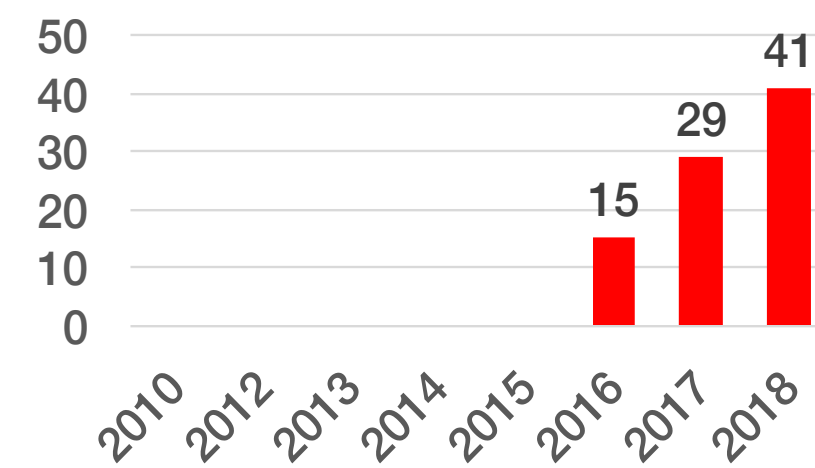
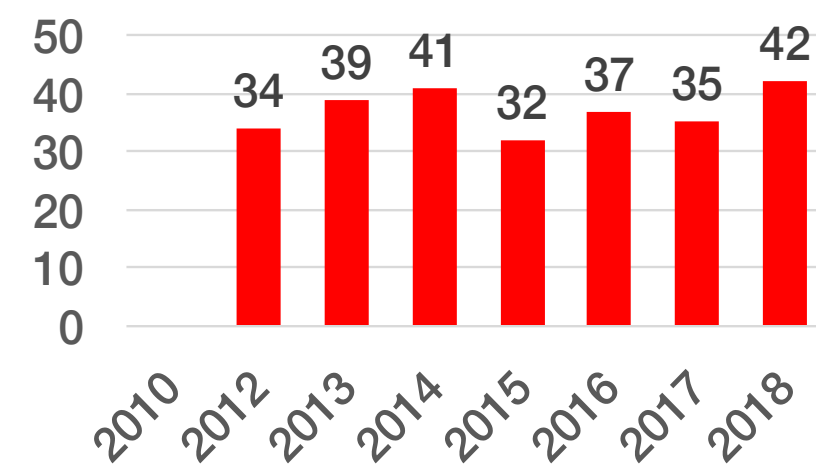
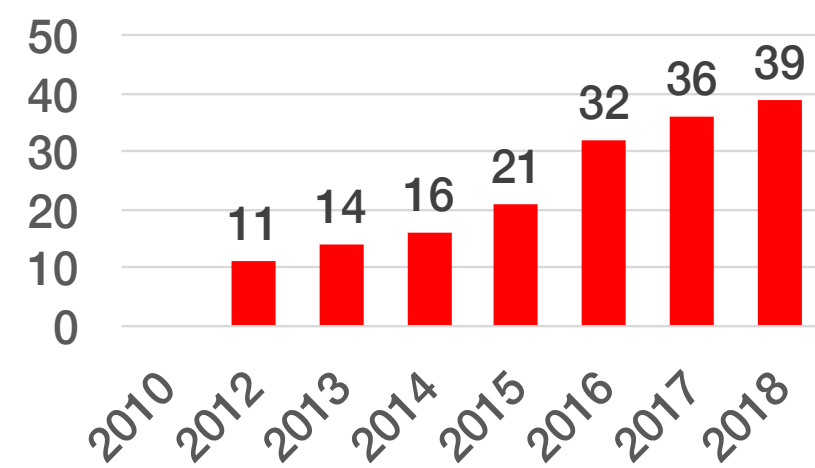
## GERMANY



ENV.



SOCIAL



# Summary: Trend Negative Perception

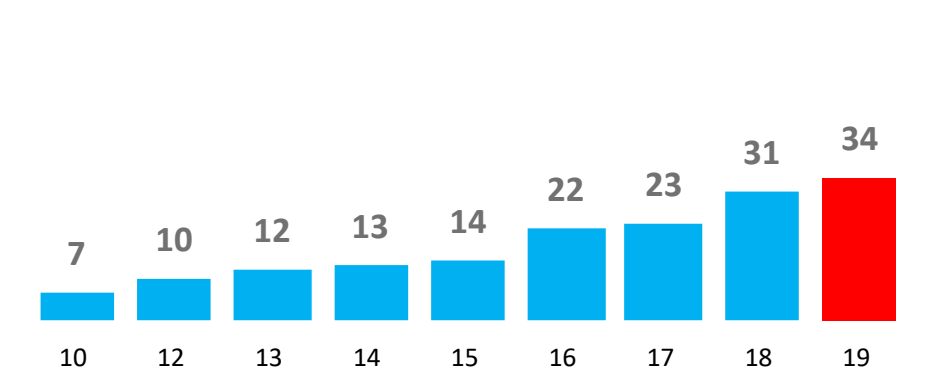
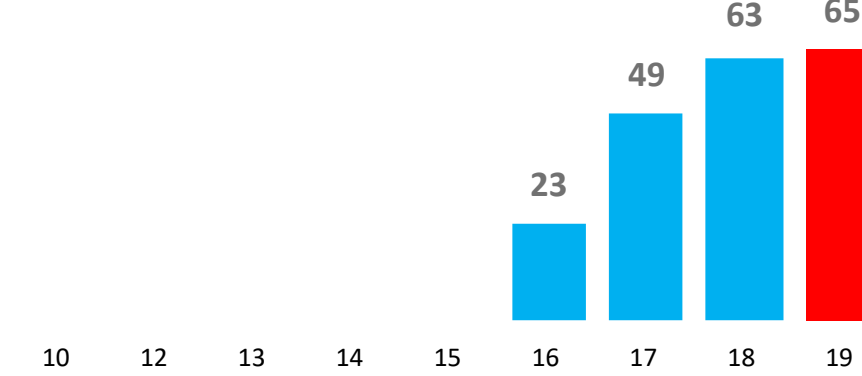
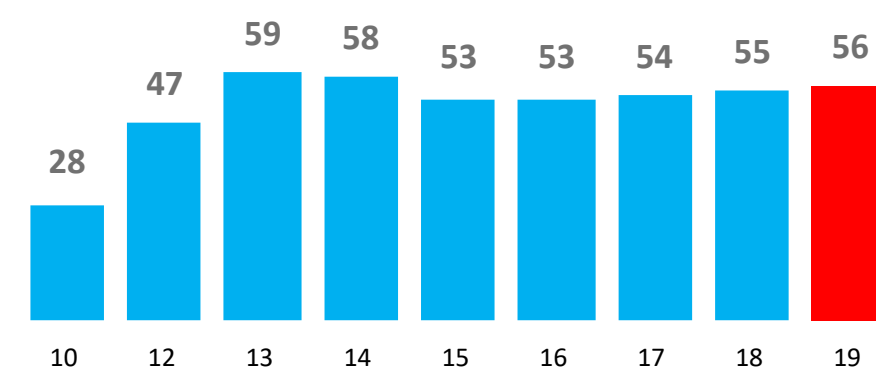
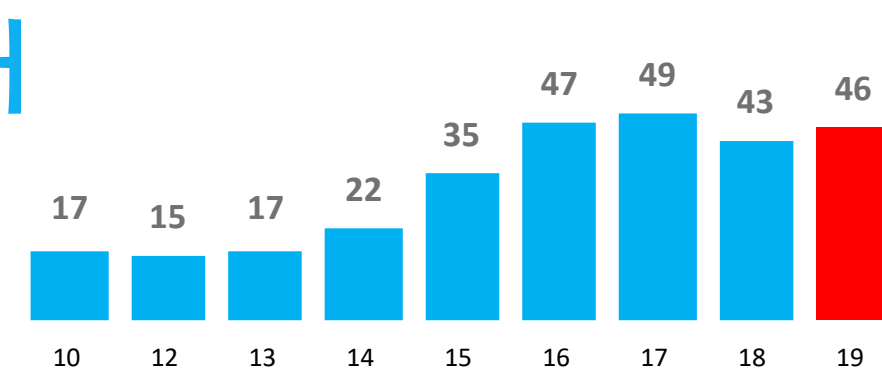
ITALY

FRANCE

SPAIN

GERMANY

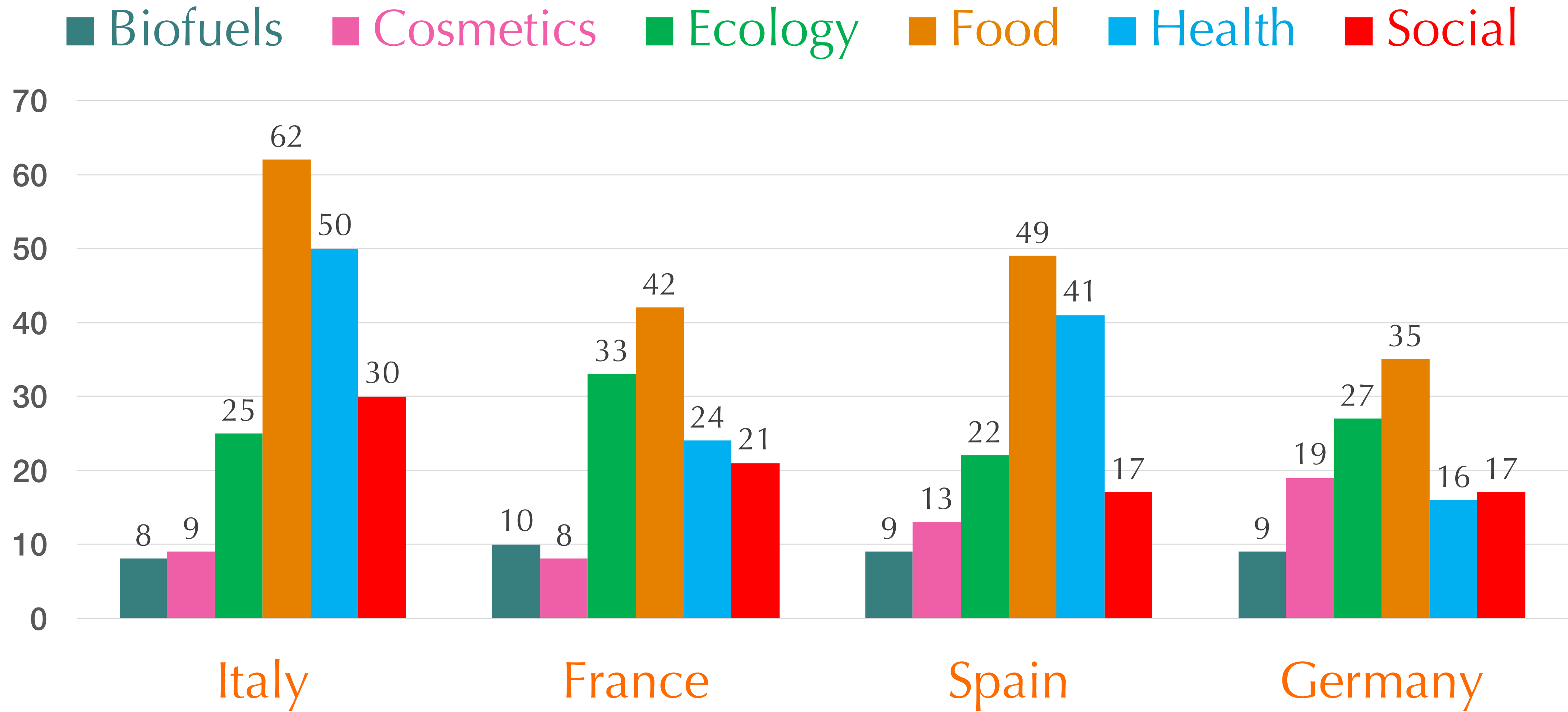
HEALTH



ENV.

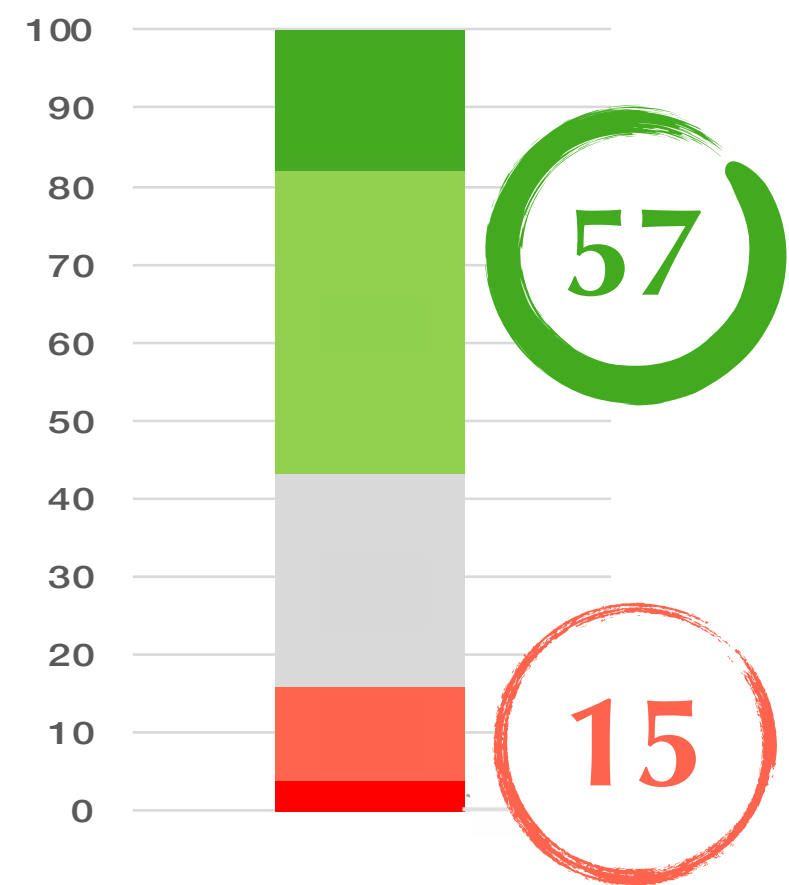
SOCIAL

# News About Palm Oil

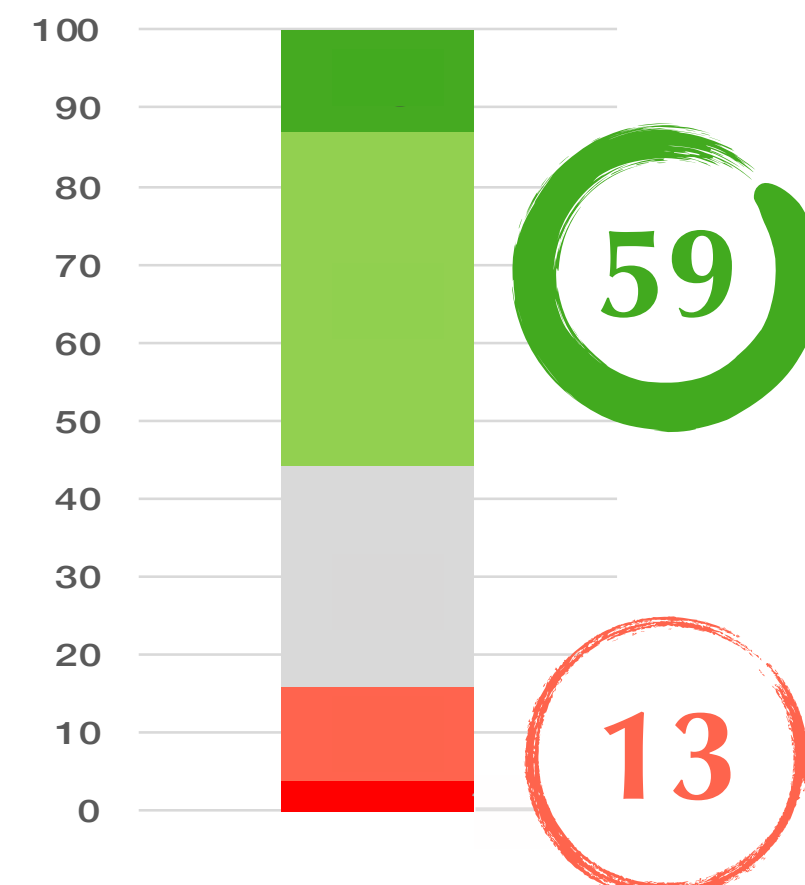


**Substitution:  
NO CLUE**

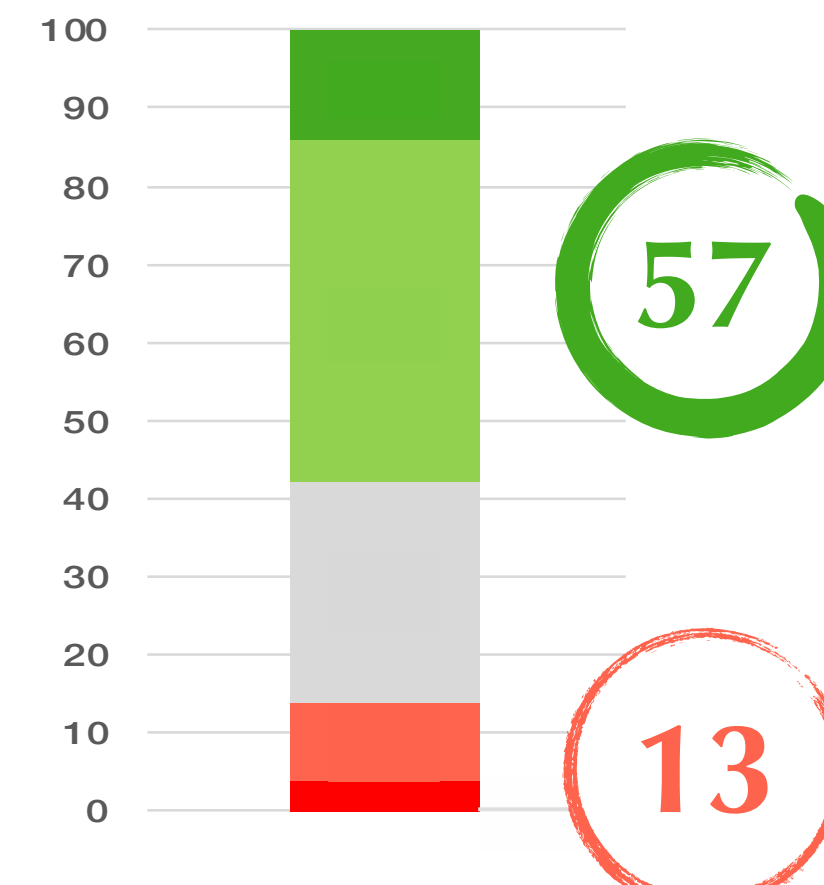
### ITALY



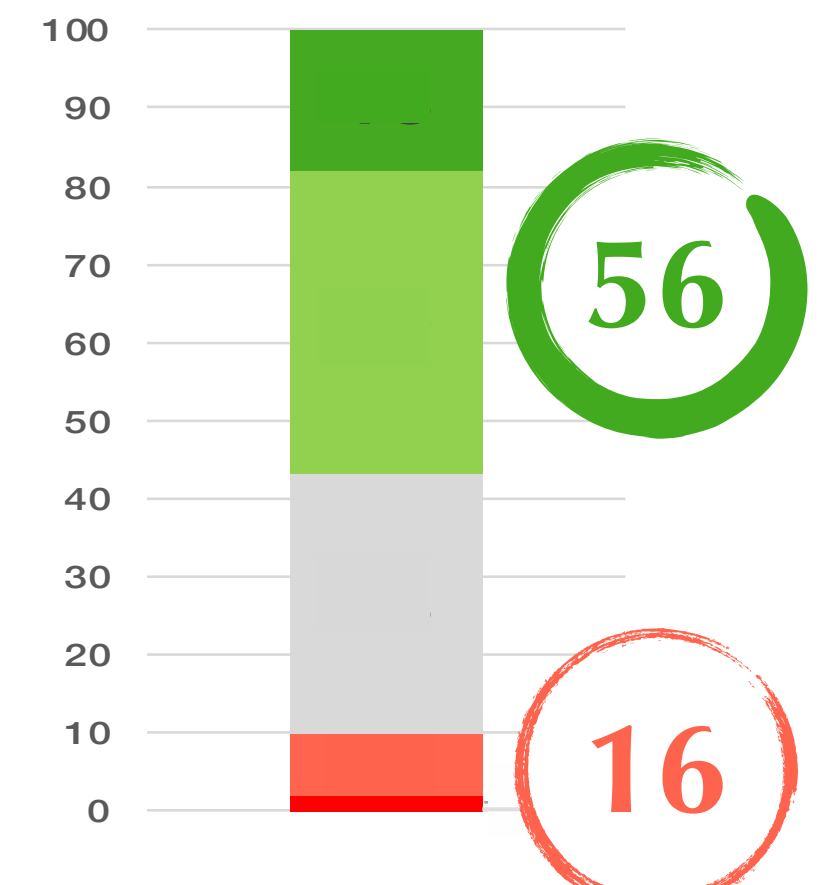
### FRANCE



### SPAIN



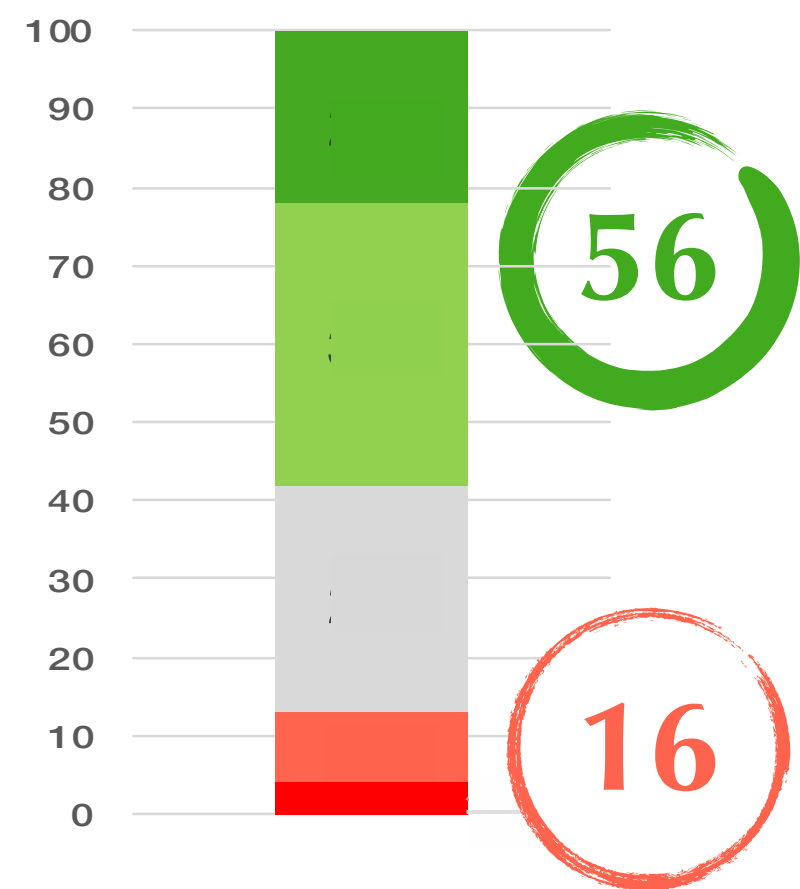
### GERMANY



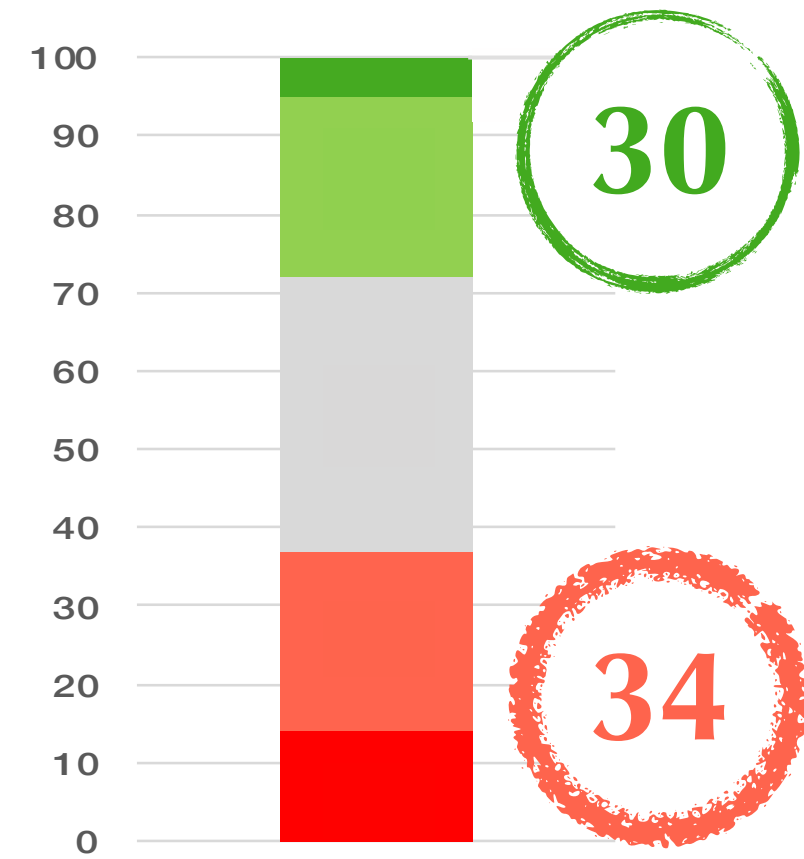
Strongly Agree ■ ■ ■ ■ ■ Strongly Disagree

**Claims:  
MKT TRICK**

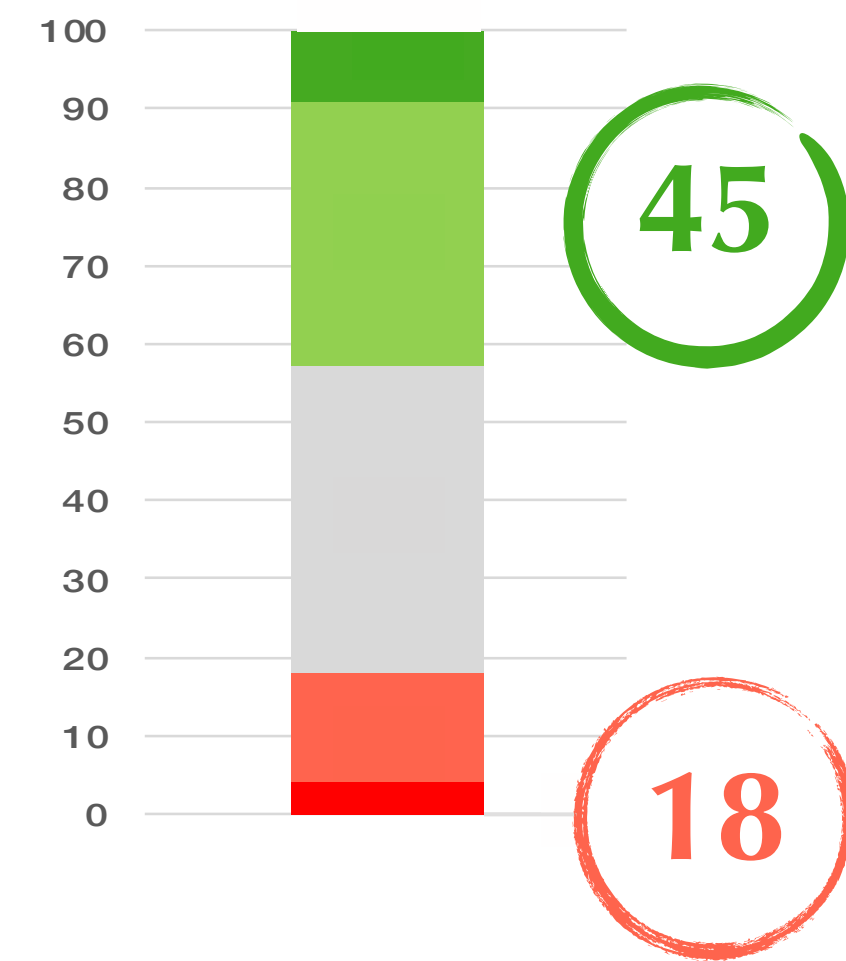
### ITALY



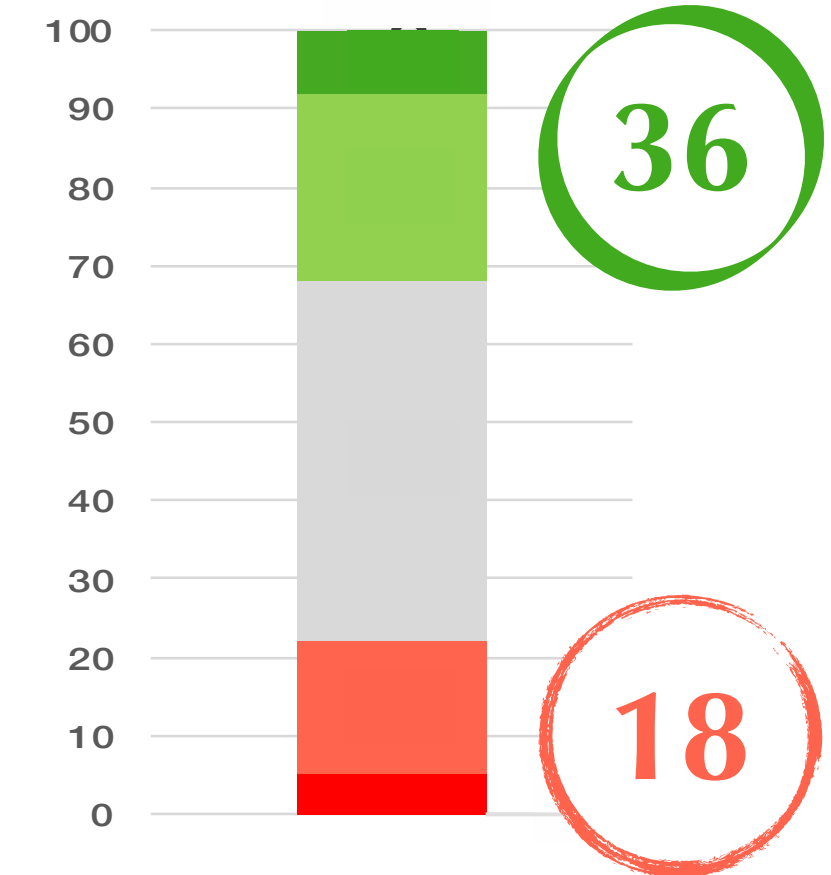
### FRANCE



### SPAIN



### GERMANY



Strongly Agree ■ ■ ■ ■ ■ Strongly Disagree

# Chapter 3 - Free From Products

# Healthy Lifestyle...

- + 11,7% EU Free From Products sales (2017)
  - Only 1,3% EU Free From Allergens (2017)
-

Extending *Free From Products* into Healthy Lifestyle



# Chapter 4 - The Label

# Label is the King

- The 5th P: Packaging
  - It captures consumers
  - It conditions their choices
-

PERCORSO SALUTE

**Galbusera**

meno **40%** di grassi\*

meno **60%** di grassi saturi\*

FRAGOLE

se

Leggers

\* -40% di grassi e -60% di grassi saturi

**CONAD**

Piace

**Cornetti**  
CON RIPIENO DI CILIEGIA

SENZA ZUCCHERI AGGIUNTI

la vita free

**zero** GRASSI

Milchhof **Meran**  
Latteria sociale

YOGURT MAGRO

zero

Sin azúcar\* ✓ Con fruta natural

0% grasas trans

Sin colesterol

PAQUETES INDIVIDUALES

**Fiber Cookies**

Panecillos de fibras con **PLÁTANO**

EST. PARMA 1877 - ITALY'S #1 BRAND OF PASTA

**NEW!**

**Barilla**

**GLUTEN FREE**  
GREAT TASTE, MADE WITH CORN & RICE

**PENNE**

Morrisons

**FREE FROM**

GLUTEN FREE

**SEASONED CURLY FRIES**  
bake or fry

# Power to the Label

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EU Market scenario 2016/19 (food & wellness):

- Mature, fragmented, aggressive
  - Driven by emotions - media, influencers, gurus
  - No scientific evidence
-

And...No Ethics

# **Chapter 5 - Free From Palm Oil**

# The Fairy Tale

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Palm Oil is an easy target:

- **Harmful** - somebody says so
  - **Unsustainable** - NGOs say so
  - **Unethical** - friends of the above say so
-

And...it's not grown in Europe



...What do you see here...???



**Zuppoie**  
BALOCCO

con Latte Fresco Italiano

Senza olio di Palma

vivi verde  
coop

muesli alla frutta

SENZA OLIO DI COCCO E OLIO DI PALMA NE' AROMI

BIOLOGICO

**MISURA**

FIBREXTRA

con l'esclusiva Selezione Integrale Misura

novità  
senza olio di palma

BISCOTTI INTEGRALI

dal 1911  
**Colussi**

SCINTILLE

con latte e uova freschi

SENZA Olio di Palma

con Farina POCO raffinata

**Paluani**

1921

Cornetti di Pasticceria

CILIEGIA

Senza Olio di Palma

NUOVA RICETTA +50% di FARCITURA

**MULINO BIANCO**

Barilla

Questa storia inizia con...

SENZA OLIO DI PALMA

Flauti Cioccolato

# Chapter 6 - The Impact

# The Fall

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- - **18%** palm oil import (food)
  - - **60%** Indonesian palm oil import (food 2014/18)
  - - **40%** Malaysian palm oil import (food 2017/18)
-

# The Surge

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Increase in *Free From Palm Oil* sales:

- **+13,5%** 2016/2015
  - **+12,9%** 2017/2016
  - **+3,8%** 2018/2017
-

# Chapter 7 - Science

Are *Free From Palm Oil* goods better???



We know the answer...but...

# Palm oil free, with more saturated fats

2nd Edition

A comparative analysis of the nutritional values appearing on the packaging of 60 products. Does palm oil always mean more saturated fats? Not so.

Published on 10 October 2017

**ForFreeChoice**

Defending Consumers' Rights To Free Choice

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Please quote this study with the following formula:  
For Free Choice (2017), "Palm oil free, but more saturated fats. A comparative research on nutritional profile indicated on the packaging of 60 food products. 2nd Edition."

Please direct inquiries to Campagne Libérali:  
[info@campagneliberali.org](mailto:info@campagneliberali.org)  
[www.forfreechoice.org](http://www.forfreechoice.org)

This publication can be downloaded at no cost at  
[www.forfreechoice.org/palm-oil/](http://www.forfreechoice.org/palm-oil/)

# We compared Saturated Fats



Brand	Product type	% Fats in 100g	Of which Saturated Fats	Palm Oil Free Claim	Ingredients
<i>Barilla</i>	Nastrine/Braided puff-pastry snack	26	14,3	YES	Cocoa butter, Sunflower Oil, Coconut, Butter
<i>Colussi/Misura</i>	Classic Cornetto	25	8,1	YES	Sunflower oil, Shea butter
<i>Barilla</i>	Chocolate filled croissant	23	12	YES	Sunflower oil, Coconut
<i>Bauli</i>	Classic Cornetto	22	12	NO	Palm Oil, Sunflower Oil
<i>Bauli</i>	Amor di sfoglia/ Braided puff-pastry snack	22	12	NO	Palm Oil, Sunflower Oil
<i>Carrefour</i>	Braided puff-pastry snack	22	12	NO	Palm Oil, Sunflower Oil
<i>Carrefour</i>	Classic cornetto with sugar	22	6,8	NO	Palm Oil, Sunflower Oil
<i>Bauli</i>	Chocolate filled croissant	20	10,2	NO	Palm Oil, Sunflower Oil
<i>Carrefour</i>	Chocolate filled croissant	20	6,2	NO	Palm Oil, Sunflower Oil

Brand	Product type	% Fats in 100g	Of which Saturated Fats	Palm Oil Free Claim	Ingredients
<i>Barilla</i>	Abbracci/Chocolate & cream shortbread biscuits	23,5	10,5	sì	burro, olio di girasole
<i>Balocco</i>	Girandole/ Chocolate & cream shortbread biscuits	22	9,2	sì	olio di girasole, burro di cacao, burro,
<i>Simply</i>	Chocolate & cream shortbread biscuits	19,9	2,7	no	olio di palma, burro
<i>Bauli</i>	Farfallegre/ Chocolate chip & milk shortbread biscuits	18,7	10,28	no	olio di palma, olio di cocco

# Findings

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- **75%** No improvement
  - **20%** No significant improvement
-

*Palm Oil Free* claim deceives Consumers

Illegal???

# After the Study

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- Technocrats: improvements must be significant
  - Regulator: no position...
  - Media: went quiet
-



# Chapter 7 - Science

*And the smart Industry...???*

# The Good Samaritan

How food producers/traders reacted:

- *Stop Palm Oil Free* (2-3 cases)
  - Appeal precautionary principle (1 case)
  - Whining
-

*What about sustainability...???*







# Chapter 8 - Science, again



## ENVIRONMENTAL IMPACT OF THE INGREDIENTS PURCHASED IN 2016

	CARBON FOOTPRINT (t co <sub>2</sub> eq)	WATER FOOTPRINT (m <sup>3</sup> )	ECOLOGICAL FOOTPRINT (ha)
Durum Wheat	518,931	1,166,983,968	6,697,465
Common Wheat Flour	173,936	385,195,777	1,765,123
Durum Wheat Semolina	127,381	286,457,765	1,644,017
Eggs	100,976	66,267,943	555,738
Common Wheat	29,520	65,374,298	299,571
Sunflower Oil	53,198	63,686,382	479,075
Palm Oil	30,078	44,678,399	265,788
Rapeseed Oil	14,164	26,008,799	138,209
Rye and Rye Flour	17,806	16,640,992	208,716
Tomatoes and derivatives	19,174	1,562,717	77,240
<b>TOTAL</b>	<b>1,085,164</b>	<b>2,122,857,039</b>	<b>12,131,122</b>

	Total tons purchased		Tons selected from responsibly managed supply chains	Percentage of purchases selected from responsibly managed supply chains on the total
	2015	2016		
Durum Wheat	1,106,749	1,167,835	190,000	16%
Durum wheat semolina	234,000	215,000	0	0%
Common wheat	81,013	82,356	0	0%
Common wheat flour	365,593	363,941	118,909	33%
Rye and rye flour	60,209	58,082	0	0%
Tomato and derivatives	39,400	53,674	37,450	70%
Palm oil*	34,000	18,249	18,249	100%
Sunflower seed oil	7,000	20,003	5,600	28%
Rapeseed oil	5,642	5,998	0	0%
Eggs	24,500	23,691	18,543	78%
<b>Total</b>	<b>1,958,106</b>	<b>2,008,875</b>	<b>388,751</b>	<b>19%</b>

\*During 2016, Barilla substituted the presence of palm oil in all their recipes with other vegetable oils, becoming a "ZEO PALM OIL" company.

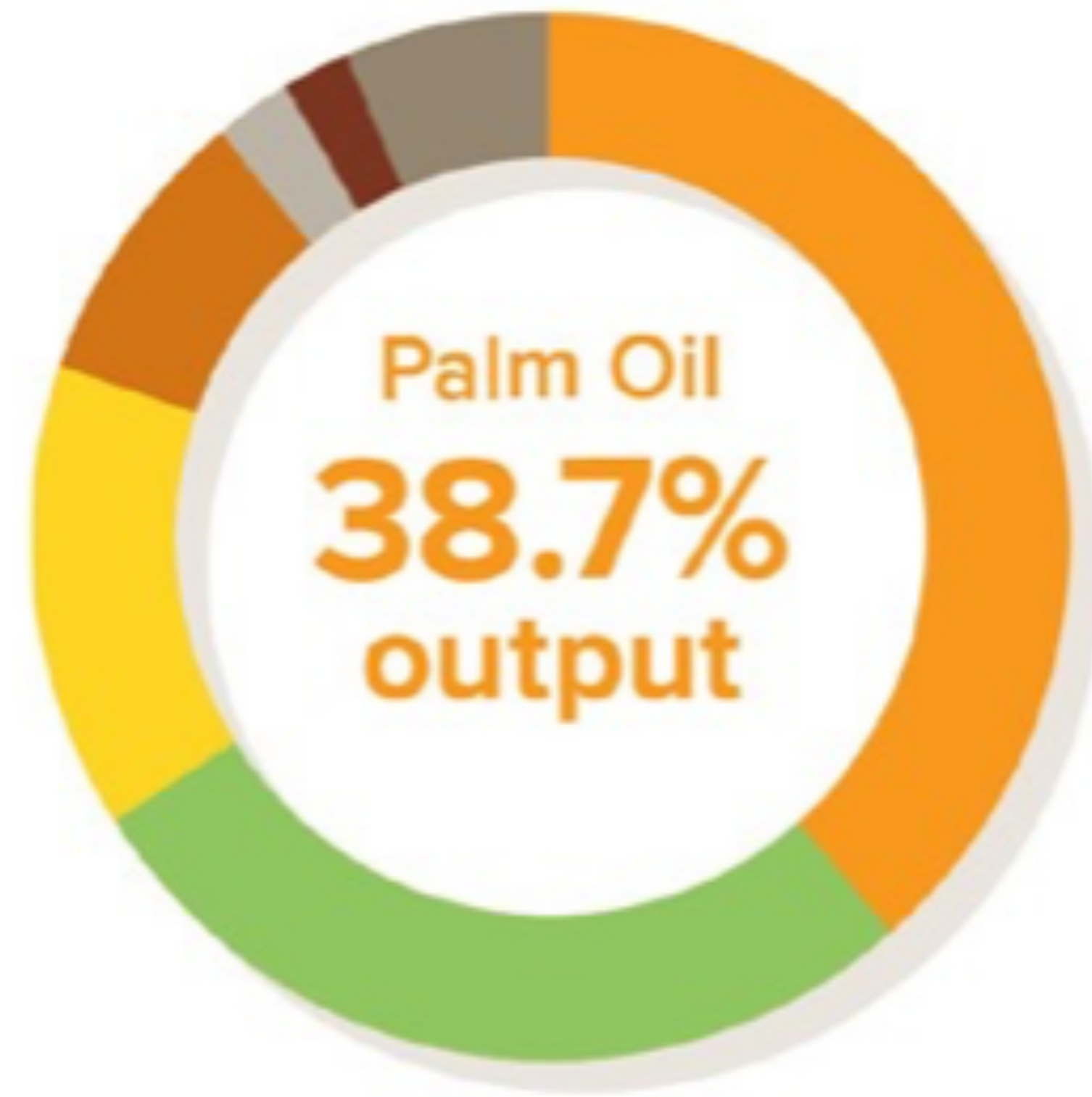
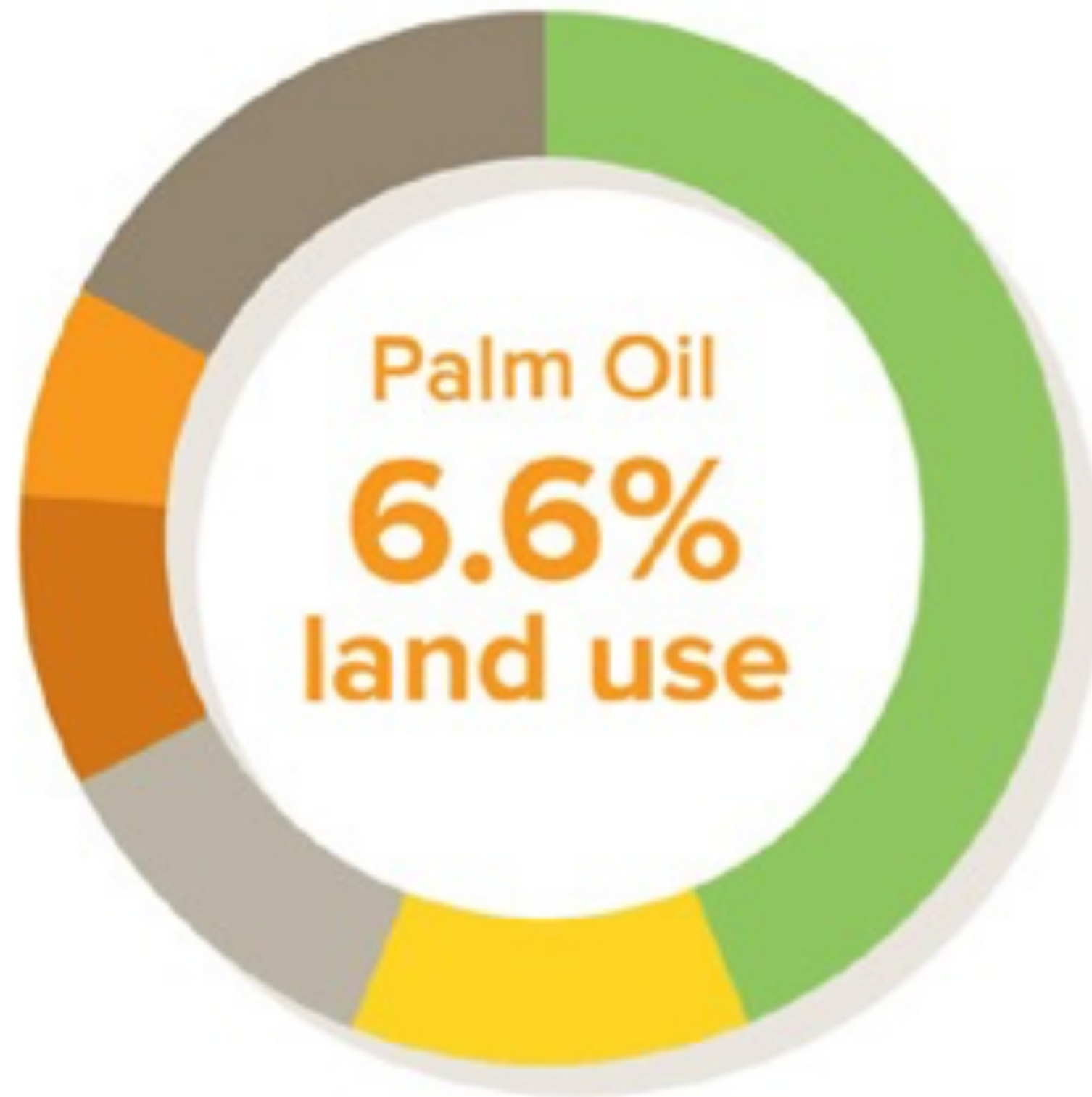


# Cornetti

Cioccolato

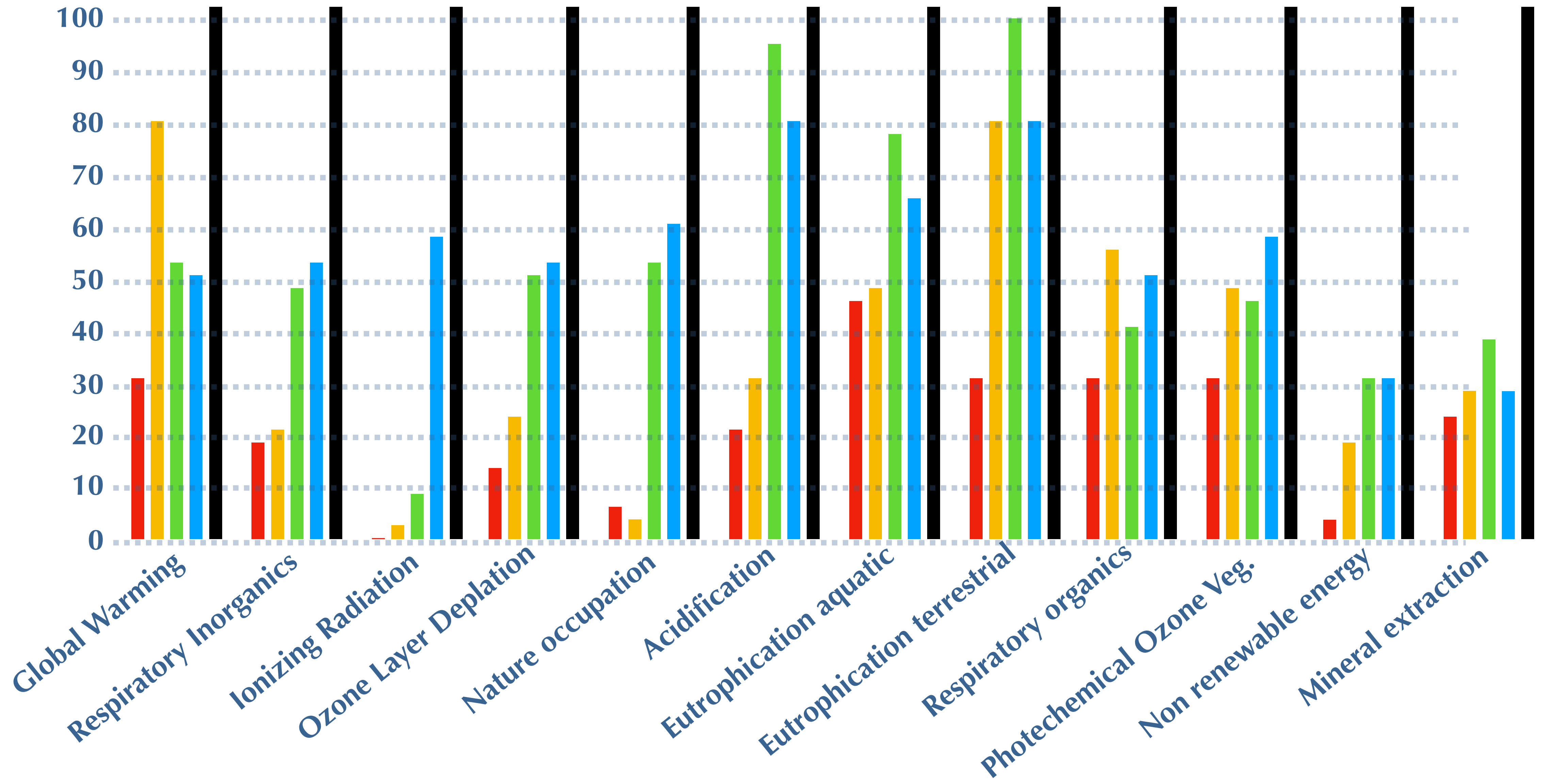
SENZA OLIO DI PALMA  
SENZA ADDITIVI CONSERVANTI

# Land Use/Output

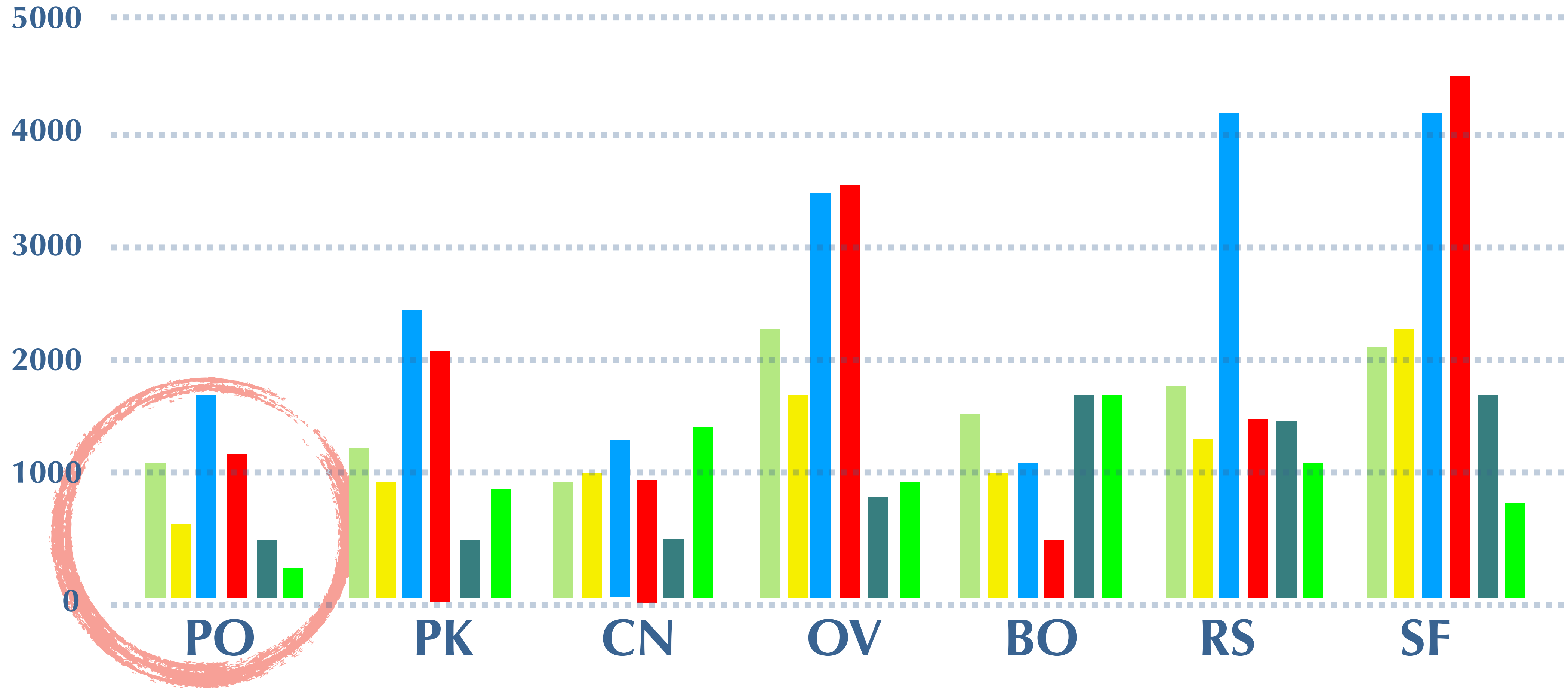


# LCA: Comparison

■ **UP23**   ■ **Avg. Palm Oil**   ■ **Avg. Rapeseed**   ■ **Avg. Sun Flower**   ■ **Avg. Peanut Oil**



# LCA: Environmental Profiles



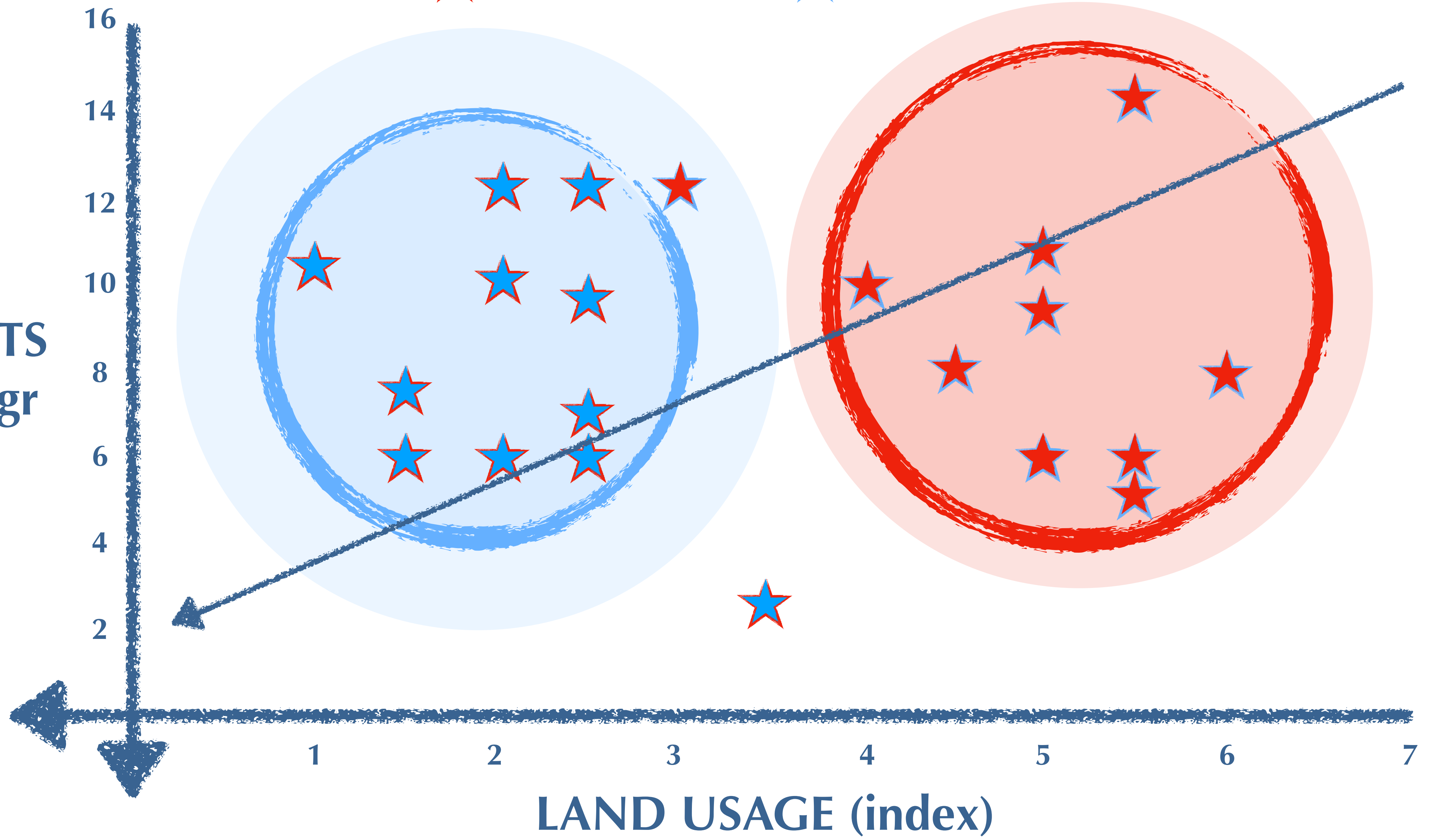
Energy Global Warming Acidification

Eutrophication Photochem. Smog Land Use

★ Palm Oil

★ Palm Oil Free

SAT FATS  
gr/100gr



A thick, red, hand-drawn brushstroke underline that starts with a slight curve on the left and then extends horizontally across the page.

*Palm Oil Free* claim deceives Consumers



# **Chapter 9 - The Free From Bluff**

# Commercial Gain

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Free From Palm Oil generates more sales and volumes

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# The Alternatives

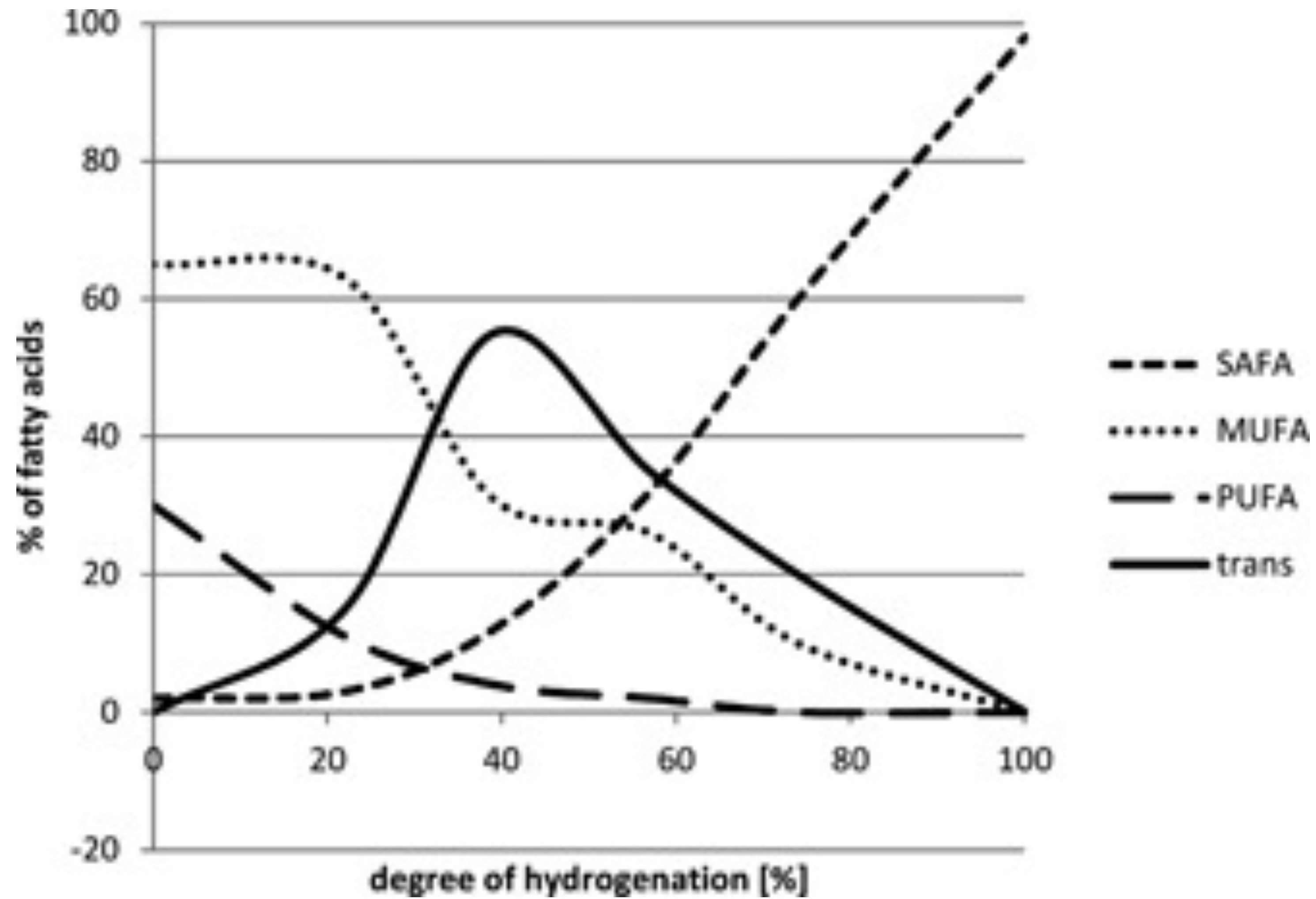
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Palm Oil main alternatives:

- Hydrogenated fats
  - Partially Hydrogenated fats
  - Liquid oils (Rapeseed, Soy, Sunflower), coconut, butter, Karatè, etc.
-

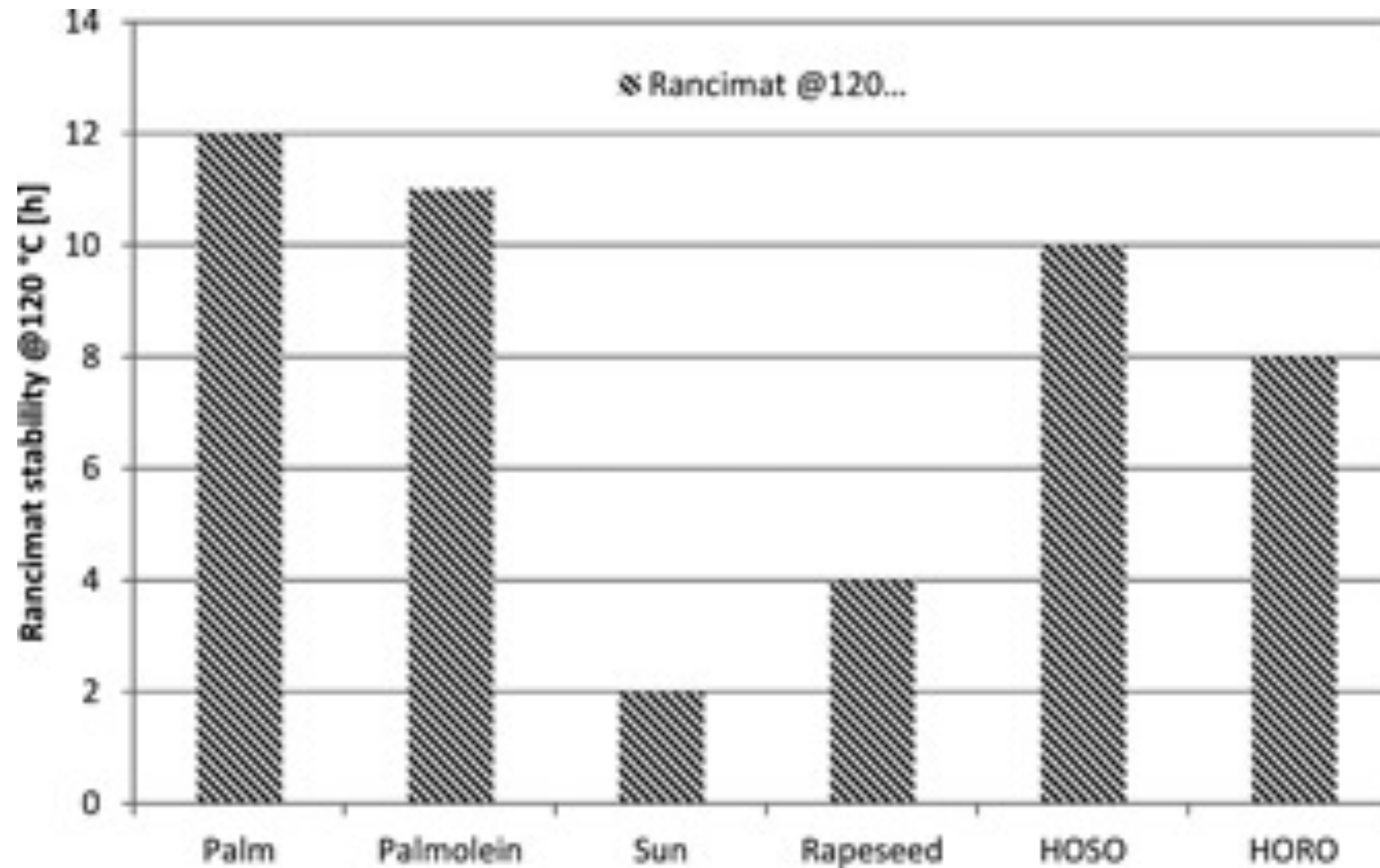
# The Alternatives

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# The Alternatives

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# The Alternatives

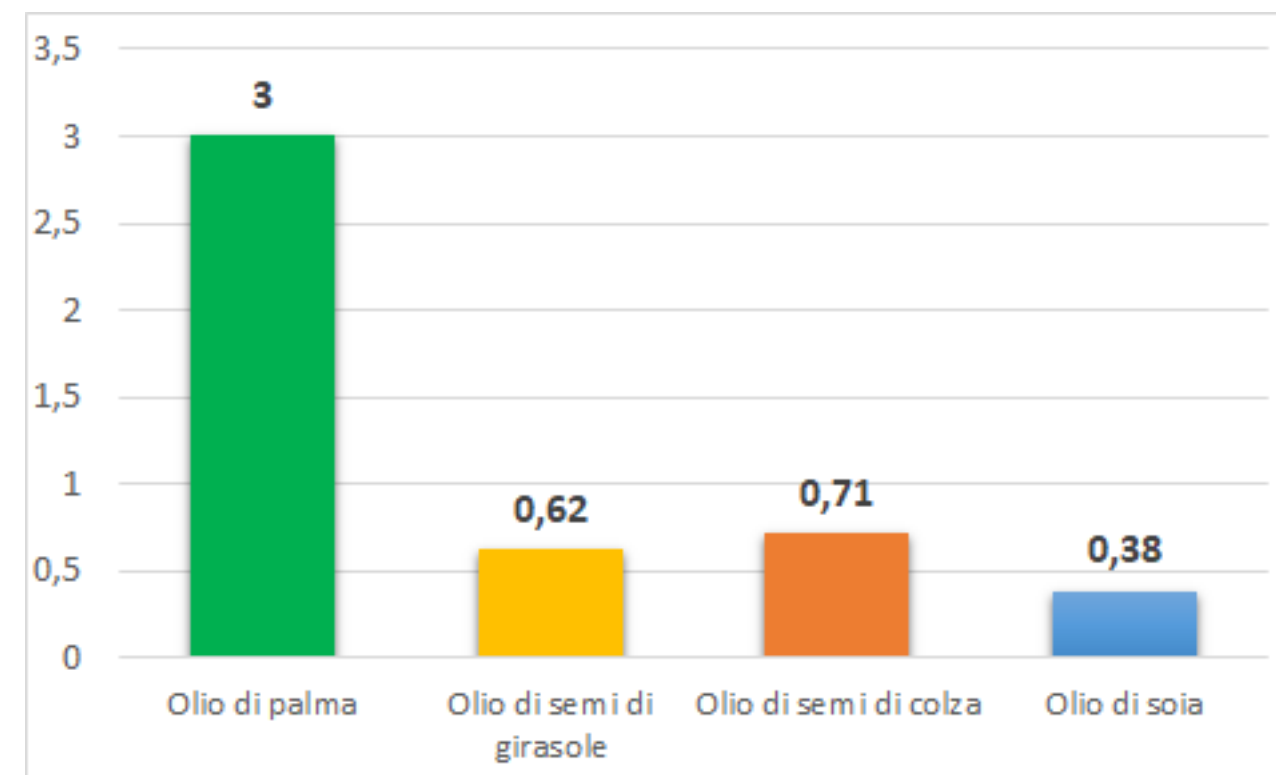
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Alternative oil processing is expensive.

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# The Alternatives

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# The Alternatives

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	2014-2015	2015-2016	2016-2017	2017-2018	TOTAL H
Rapessed	138.000	24.700	70.000	15.000	247.700
Soy oil	294.000	53.000	151.000	32.800	530.800
Sunflower	164.000	29.500	86.000	18.000	297.500

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# The Alternatives

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	H TOTAL	Vs Palm Oil
Rapessed	77.898.000	60.898.000
Soy oil	166.324.000	149.324.000
Sunflower	87.917.000	70.917.000

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**A DELICATE BALANCE**

# Get in Touch

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[ppaganini@competere.eu](mailto:ppaganini@competere.eu)

[pietropaganini.it](http://pietropaganini.it)

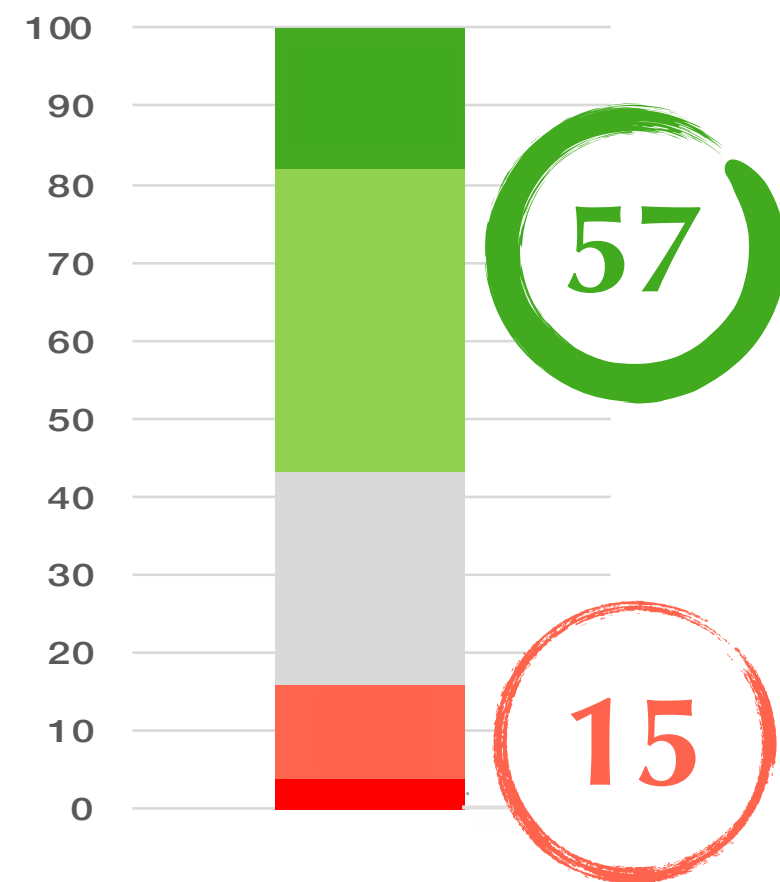
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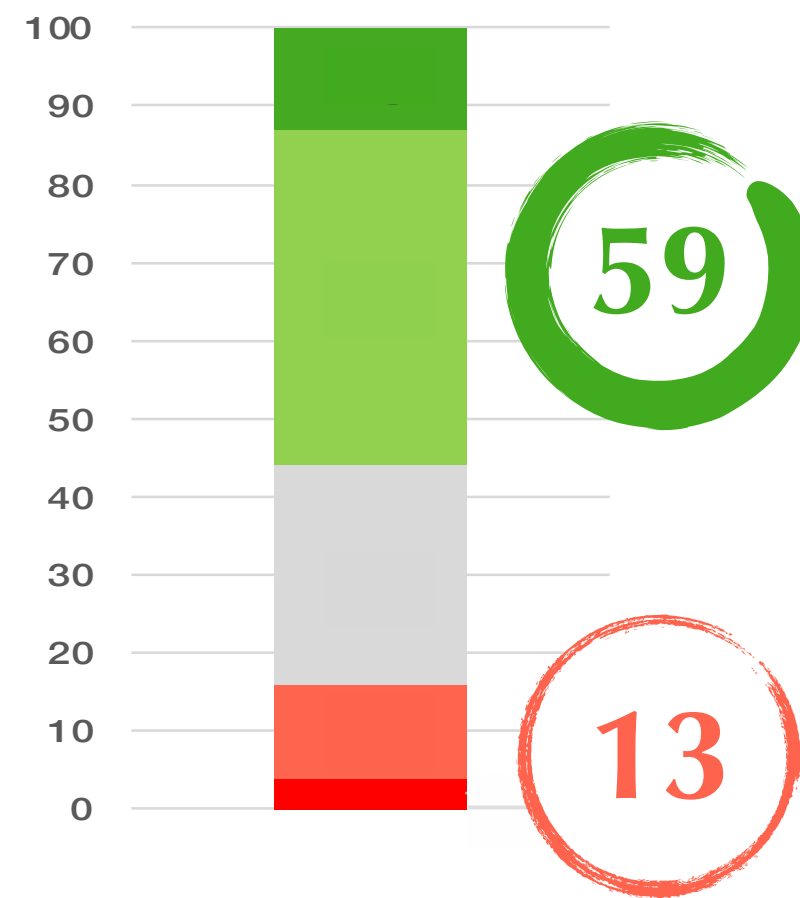
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**Substitution:  
NO CLUE**

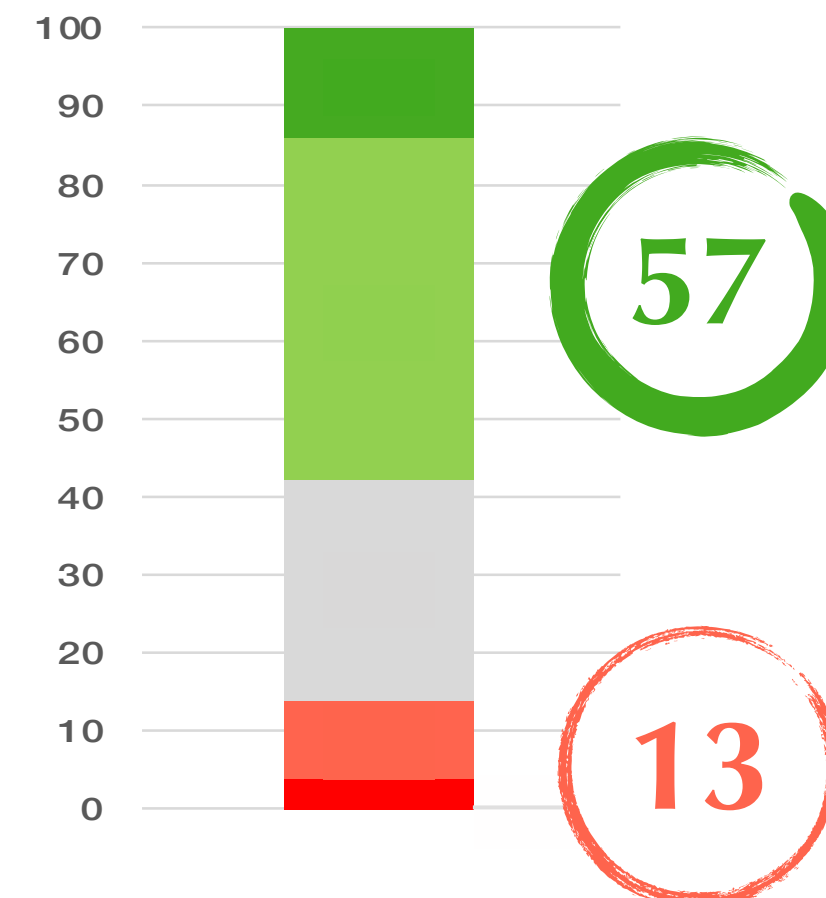
ITALY



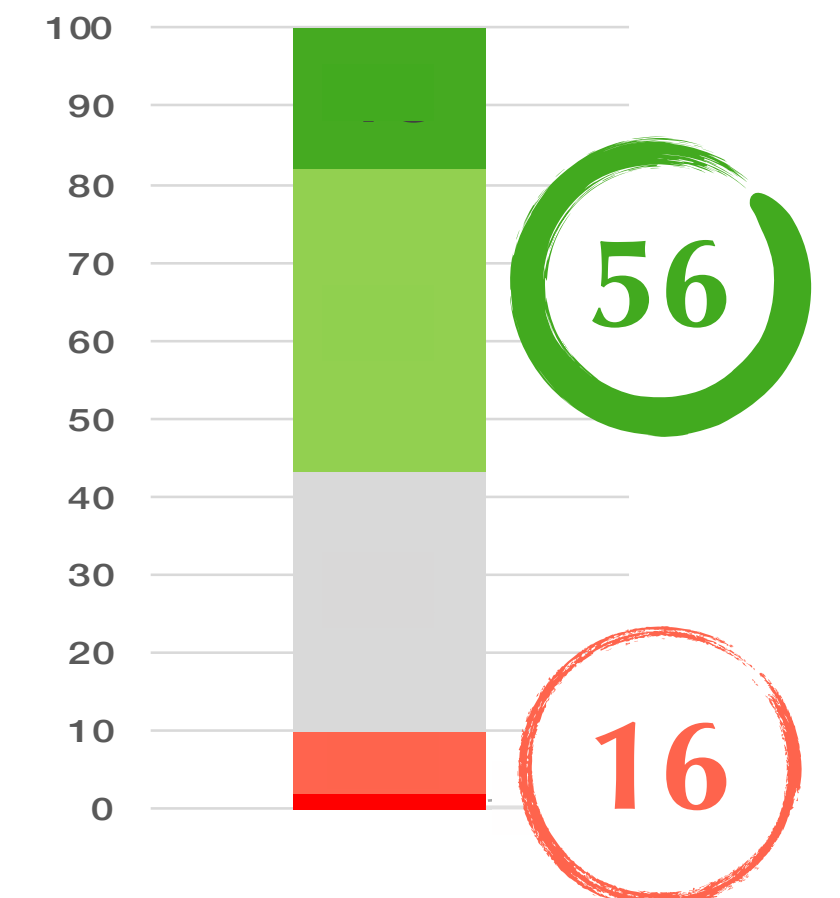
FRANCE



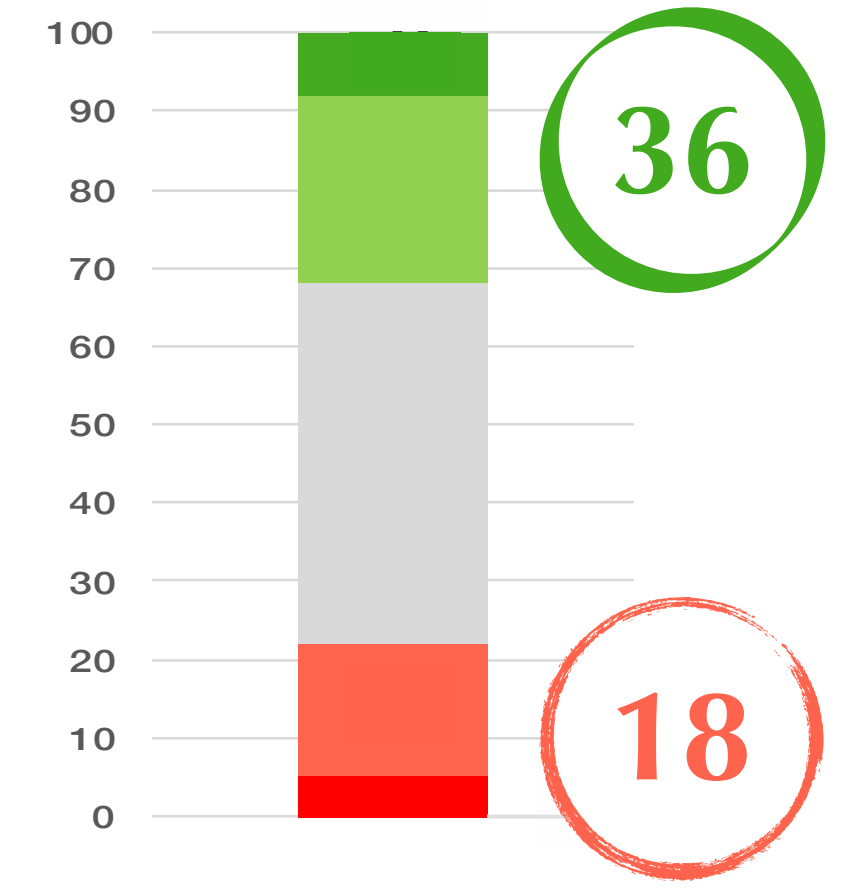
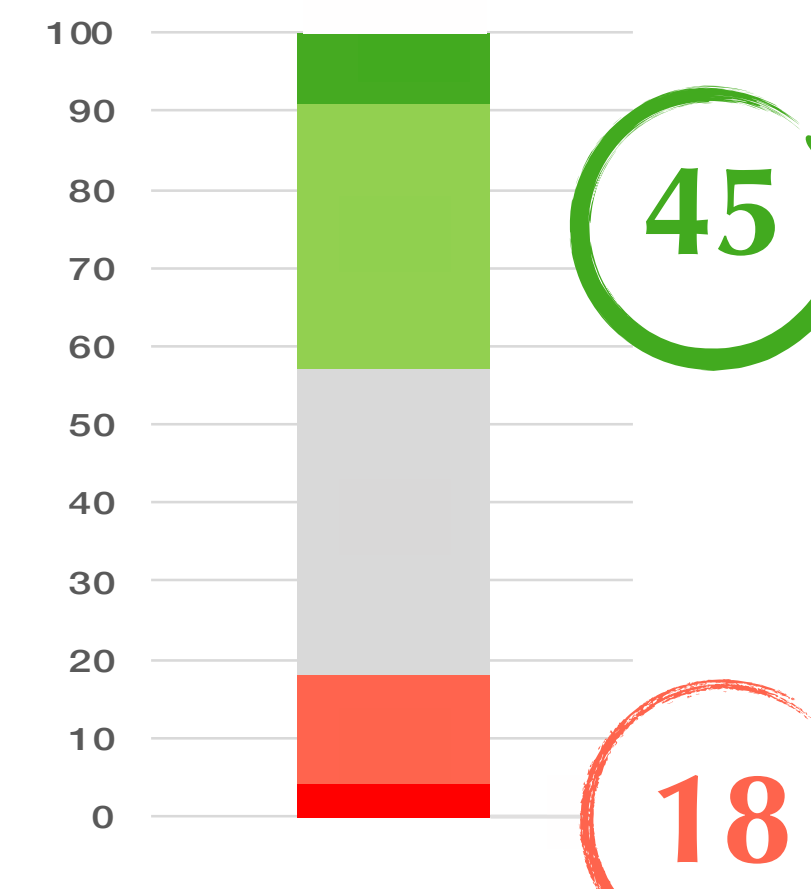
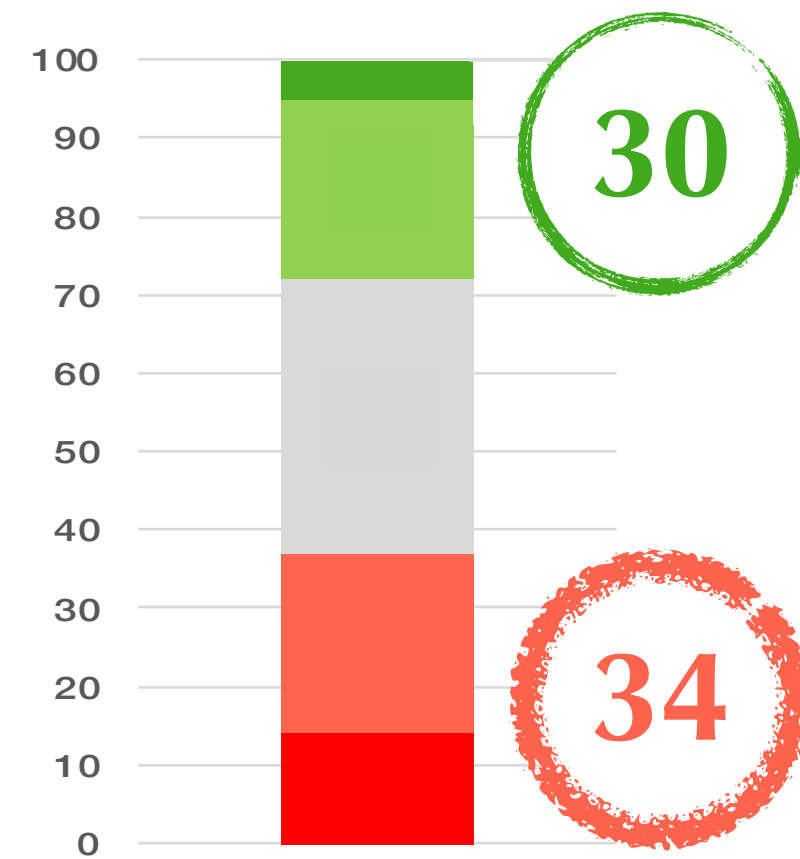
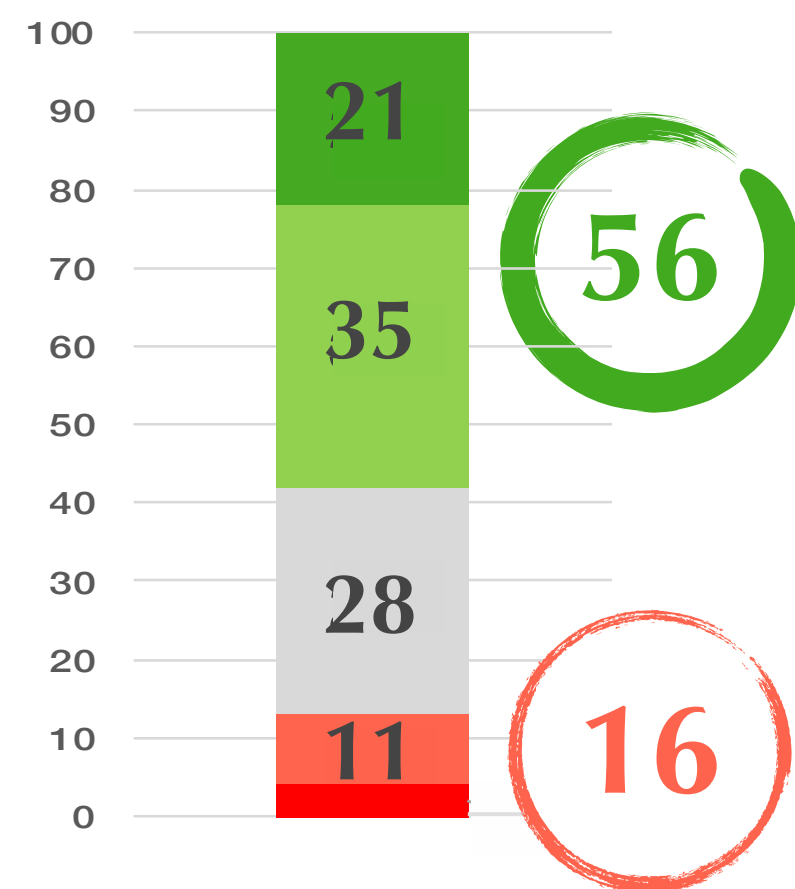
SPAIN



GERMANY



**Claims:  
MKT TRICK**



Strongly Agree ■ ■ ■ ■ Strongly Disagree