



Eesti Tsöliaakia Selts

Licensing and gluten free markets in Estonia and other Nordic-Baltic countries

Katre Trofimov | 2017



Who need gluten free food?

Gluten-related disorders

- Coeliac disease – blood markers + biopsy
- Dermatitis herpetiformis (often known as coeliac disease of skin) – skin test + biopsy (if needed)
- Non-coeliac gluten sensitivity – syndrome when patients have different problems while eating gluten after coeliac and allergy have been excluded. GF diet
- Wheat allergy – allergy tests



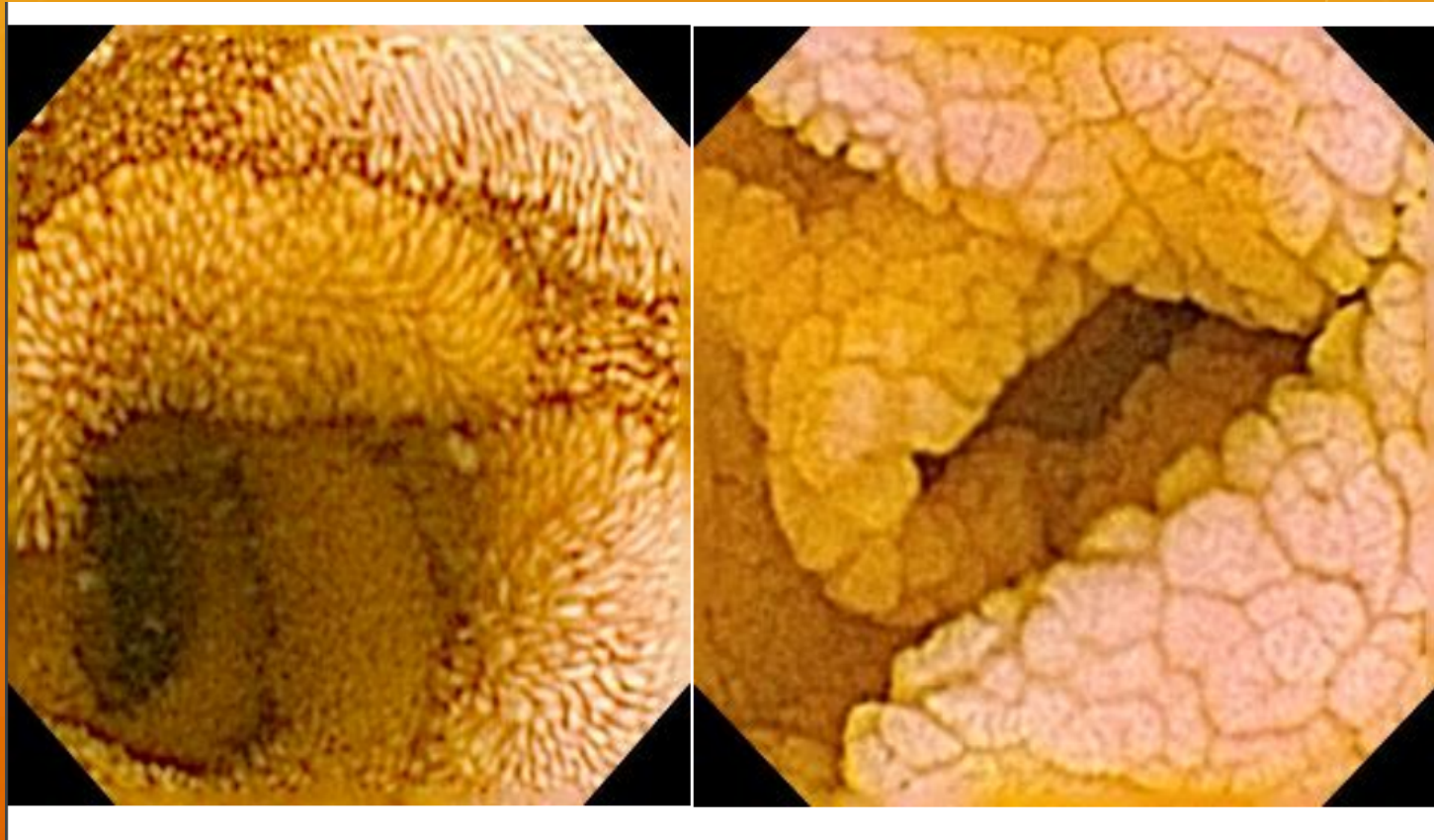
Who need gluten free food?

Coeliac disease

- Genetically predisposed autoimmune gastrointestinal disease which may occur at any life point.
- First round relatives have 10-15% chance to coeliac disease.
- Due to gluten, protein found in wheat, barley, rye and oats, body tissues start to harm itself and damage the small intestinal villies.
- 3rd frequent autoimmune disease, ~2% of population – often undiagnosed.



Who need gluten free food?

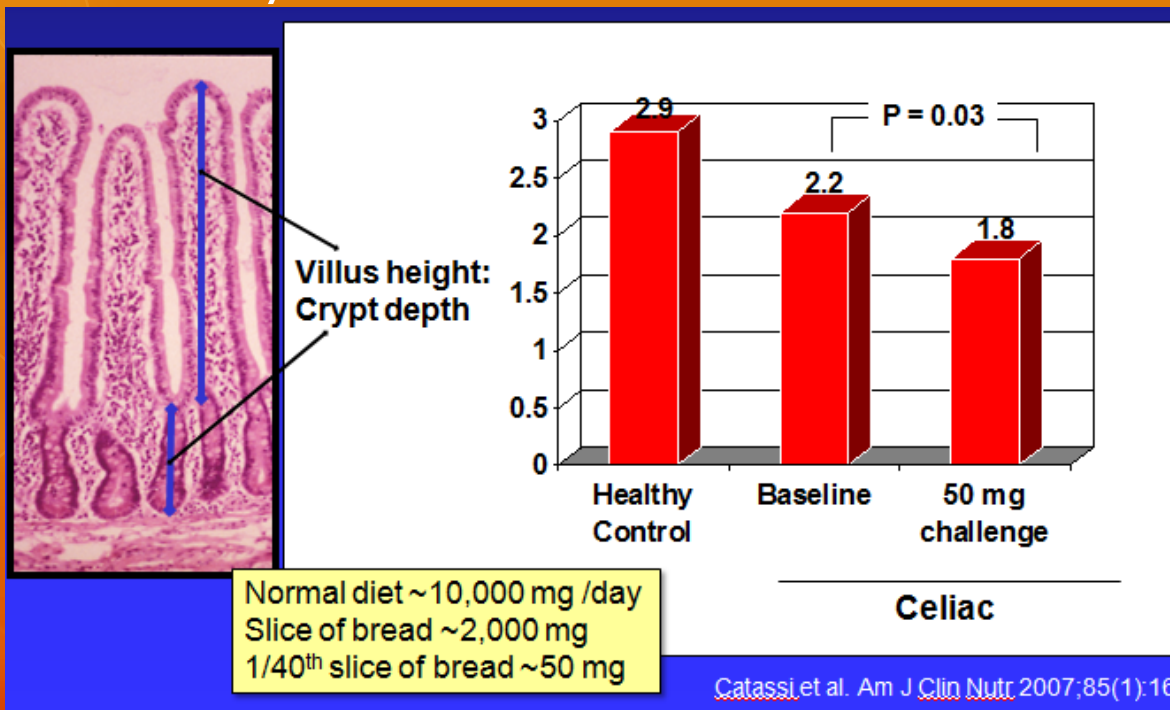


Salupere, R. (2016) *Tsöliaakia peensooles ja peensoolest väljaspool*



Who need gluten free food?

- The only cure for coeliac is strict lifelong gluten free diet.
- It is scientifically proved that the villies start to damage already when eating 50mg of gluten per day.



Histology after 90 days of microchallenge, 50mg gluten per day



What is gluten free?

According to EU commission implementing regulation 828/2014 on the requirements for the provision of information to consumers on the absence or reduced presence of gluten in food...

...The statement '**gluten-free**' may only be made where the food as sold to the final consumer contains no more than **20 mg/kg of gluten**.

Problems with gluten free statement



- Lack of knowledge about the regulations behind the statement.
- Trying to avoid the regulations behind the GF statement by using different statement:
 - Does not contain gluten
 - No gluten added
 - For glutensensitives etc.

EU regulation 828/2014 article 3, section 1!



Crossed-Grain Symbol

- International trademark for gluten free foods which can be applied voluntarily via license contract.
- Producers need to annually audit the production facility and test the gluten content according to the European Licensing System (ELS) Standard.





Crossed-Grain Symbol history



- **1972** – Michael Carpenter designed the symbol
- **1987** – ownership assigned to Coeliac UK
- **1995** – registered as a trademark in UK and number of other EU countries
- **2001** – registered as Community Trademark in Europe
- **2009** – European Law EC41/2009 → GF can be applied to foods 20 mg/kg (ppm) or below



- **2011** – trademark in Europe is assigned to the Association of European Coeliac Societies (AOECS)
- **2012** – AOECS members start licensing the symbol

Crossed-Grain Symbol in Estonia



- Estonian Coeliac Association (Eesti Tsöliaakia Selts, ETS) is a member of AOECS.
- In 2015 we signed the contract for licensing ELS with AOECS.
- No contracts with producers yet – negotiations with 3 companies who wish to apply for CG-Symbol.

Crossed-Grain Symbol in Estonia



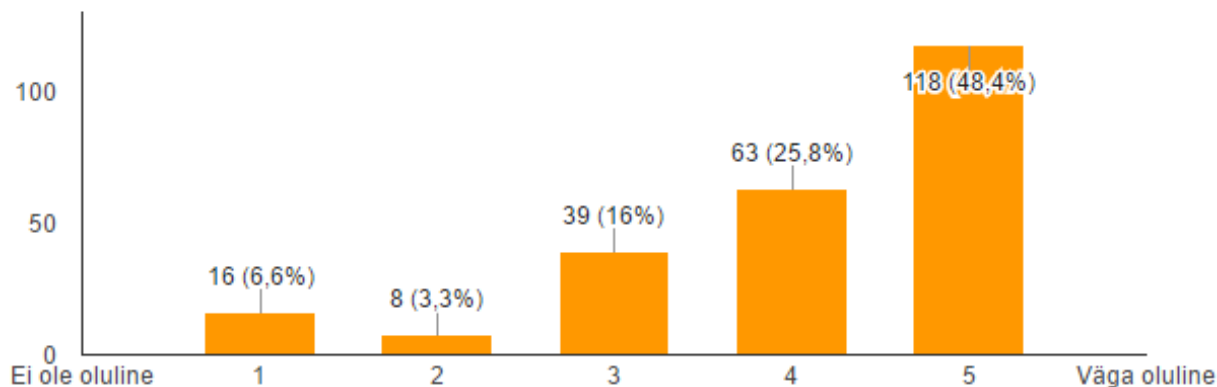
- Bigger international brands available in supermarkets and even local smaller shops.
- Supermarkets have become more open taking in special dietary food of well-known brands (Schär, Fria, Provena, Peak's Free From, Semper etc.).
- Local producers find it expensive to apply although they see the benefit for export markets.

Gluten free products trademark recognition and necessity study



- Study made in period 03.03-31.03.2016 by ETS.
- 244 responses:
 - 79 coeliacs
 - 130 other health issues
 - 75 started diet by themselves

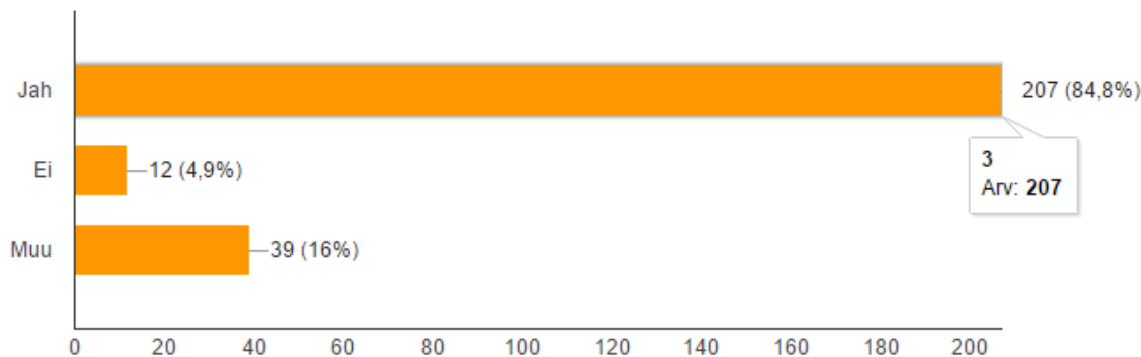
Kui oluline on Sinu jaoks "lääbikriipsutatud viljapea" märgise olemasolu tootel?
(244 vastust)



Gluten free products trademark recognition and necessity study

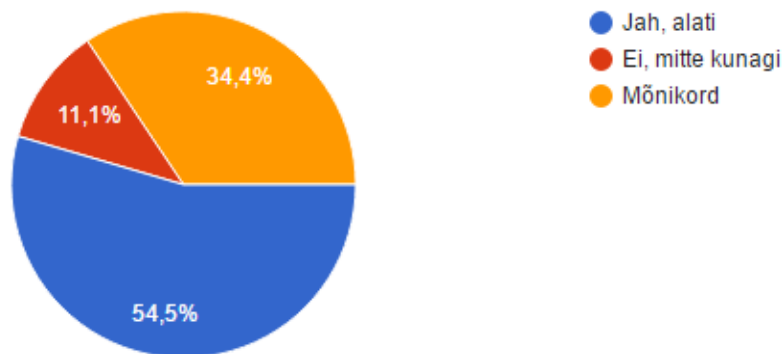


Kas jälgid poes, et tootel oleks peal kiri "gluteenivaba"? (244 vastust)



Do you look for the statement "gluten free" on the package?

Kas jälgid poes, et pakendil oleks "läbikriipsutatud viljapea" märgis? (244 vastust)



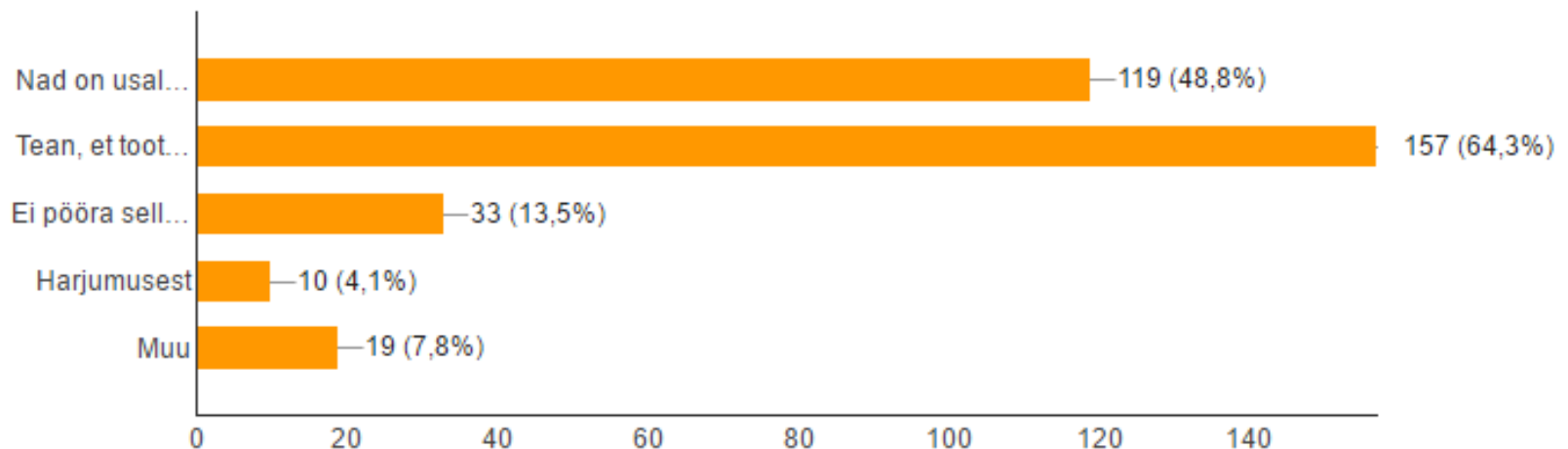
Do you look for the Crossed-Grain Symbol on the package?



Gluten free products trademark recognition and necessity study

- 119 buy CG Symbol products, because they are trustworthy
- 157 buy CG Symbol products, because they are pure (no cross-contamination)

Miks ostate "läbikriipsutatud viljapea" märgisega tooteid? (244 vastust)





Crossed-Grain Symbol product sales in Estonia 2013 vs. 2016

- Provena – pure oat product sales has gone up almost 9 times
- Schär – increase 4 times
- Peak's Free From – every year 4% increase of sales
- Still a lot of products missing for coeliacs in Estonia
 - Frozen products
 - HoReCa products
 - Ready meals

Gluten free consumers in Nordic and Baltic countries



- **Estonia** ~1% population coeliac
- **Latvia** ~0,5-1,5% population coeliac
- **Finland** ~2% population coeliac (100 000, only 40 000 diagnosed); GF diet ~4% (15-64 a.)
- **Sweden** ~1-2% population coeliac (100 000-200 000); GF diet ~6-8%
- **Norway** ~1-2% population coeliac
- **Denmark** ~0,5-1% population coeliac (only 5000 diagnosed)
- **Lithuania & Iceland** N/A



Crossed-Grain Symbol products in Nordic-Baltic countries

- **Estonia** – 0 CG Symbol contracts (3 potential licensees at the moment)
- **Latvia** – 1 producer with 3 products (too expensive system for local producers; low income; population decrease)
- **Finland** – Over 330 CG Symbol licenses, 27 producers (sales are going mostly up)
- **Sweden** – 33 active brand owners, over 500 different products (slight increase on sales ~1,2%; 40% export 2016, 51% export 2015)
- **Norway** – 2 producers export, one had 1,5 times growth in export. Export is about 10% of Norwegian CG producers.
- **Denmark** – 8 producers with totally 96 products

Crossed-Grain Symbol reputation in Nordic-Baltic countries



- **Estonia** – Reliable, trustworthy, clean products, stable quality.
- **Latvia** – More or less recognised nowadays. People on GF diet know the brand and count on it.
- **Finland** – Reliable and well-known in their target group.
- **Sweden** – Brand recognition 96%; People who knows what it means if product has CG Symbol 84%; 73% have high trust in the Symbol.

Crossed-Grain Symbol promotion in Nordic-Baltic countries



JÄLGI GLUTEENIVABA MÄRKI!



Gluteenivaba kaubamärk on Euroopa Tsöliaakia Seltside Assotsiatsiooni ametlik tähis, mille kaudu saavad toetust kohalikud tsöliaakia seltsid.

Gluteenivaba kaubamärk....

- tagab ohutuse tsöliaakiahaigete tervisele
- aitab leida usaldusväärseid tooteid
- on iga-aastaselt kontrollitud
- tähendab samasuguseid tootmisstandardeid kõikides riikides



Eesti
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KUI VAJAD GLUTEENIVABA MENÜÜD,
SIIS EELISTA GLUTEENIVABA KAUBAMÄRGIGA TOOTEID.

Eestis annab gluteenivaba kaubamärgi välja Eesti Tsöliaakia Selts www.tsoliaakia.ee



Estonia –
Thanks to
AOECS ELS
Small Societies
support fund
we had
marketing
campaign for
rising the
awareness of CG
Symbol.



Crossed-Grain Symbol promotion in Nordic-Baltic countries

○ **Sweden**

- No active promotions by SCF but producers can link to their website for advertising.

○ **Norway**

- Advertisements in their members magazines and on the web-site.
- Active campaign towards the Norwegian Brewers Association (outcome 13 of 14 Norwegian GF beers are licensed).



Crossed-Grain Symbol products missing in Nordic-Baltic countries

- **Latvia** – ready meals, precooked frozen bread or pizzas for HoReCa, frozen pastas, pizzas and pancakes for supermarkets, ice-cream in waffle. Eating out is a problem.
- **Norway** – HoReCa has too few alternatives for coeliacs.
- **Sweden** – Fresh products as bread or pasta. Eating out safely.
- **Denmark** – GF products in HoReCa, frozen products etc.
- **Iceland** – lot of products missing due to country's geographic position – expensive transport.



Conclusion

- Coeliac disease is underdiagnosed everywhere and each year new patients are diagnosed → more GF diet followers + NCGS.
- Nordic countries like **Finland** and **Sweden** have quite well established CG Symbol producer market with good export.
- **Estonia** is closer to Nordic countries as producers understand the need of CG Symbol and consumers buy CG Symbol more every year.
- **Latvia** is struggling as producers and consumers feel CG Symbol is expensive, although consumers understand the need of it.

Looking forward to new Crossed-Grain Symbol products in our markets!



Thank you!

**There is no such thing as
“a little bit gluten free”!**

**There is huge RISK
with playing with person's health!**



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www.tsoliaakia.ee



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