

Superlist Pilot

Sweden

Research Methodology



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Introduction

Supermarkets influence to a large extent what their customers buy. This gives them the opportunity to make food habits healthier and more sustainable. With Superlist, Questionmark Foundation helps supermarkets to seize this opportunity. Superlist is a multinational research project that provides insight into what supermarkets are doing to make our food healthy and sustainable. Superlist shows which supermarkets are leading the way and which lag behind, and what they can do to improve their position.

Governance

Questionmark Foundation is a European think tank, committed to providing facts, figures and arguments to the public debate on healthy and sustainable food. Questionmark Foundation is governed by an independent board whose members have no interests in the food industry. Questionmark does not receive any funding that is directly or indirectly related to the Swedish retail or food industry. Our integrity policy can be found on our website.

Partners

In this pilot study we collaborate with WWF Sweden and Reformaten. WWF Sweden is an organisation with specific expertise on the Swedish public debate around sustainable food. Therefore, WWF is linked to the sustainability indicators of this project. Reformaten is an organisation with expertise on both healthy and sustainable food. Reformaten is linked to the two health indicators of this project.



Funding

This project would not have been possible without the generous contribution of the Swedish Postcode Foundation.



General approach

This document specifies the indicators to be used for an assessment of the largest supermarket chains in Sweden. The general research approach for the assessment is based on our Research Framework, as published on www.superlijst.nl. The current document may deviate from the framework, due to the pilot status of this project.

Scope

The scope of this assessment includes the four largest supermarket chains in Sweden in terms of market share: Coop, Hemköp, ICA and Willys. The total market share of this selection adds up to approximately 88%.

Research period

Data on assortment and promotions will be collected during a 6-week period from August 15th to September 26th. During this period, all webshops will be visited in at least 4 data collection cycles.

Product

The assessment will lead to a short report with the main findings. The report will be published in two parts: one on the two health indicators, the other part on the two sustainability indicators.

Health

Around 50% of adults in Sweden are overweight or obese. Obesity is among the main five risk factors in Sweden for healthy years of life being lost (Folkhalsomyndigheten, 2022). Among the main drivers of this problem are unhealthy eating habits with high intakes of saturated fat, salt and sugar.

Recent research in the UK shows that food promotions strongly encourage the consumption of unhealthy products (defined as products high in fat, salt or sugar, 'HFSS' for short). As a consequence, the UK Government has issued legislation aimed at limiting the promotion of unhealthy food products from October 2022 onwards. The legislation focuses on promotions of the type 'buy 1 get 1 free' or '5 for only £1,-'. Research has shown that it is this 'multibuy' type of promotion that leads to the biggest increase in consumption.

These developments provide an interesting opportunity to look at the Swedish food landscape through the lens of British health research and legislation. In this study we assess the extent to which Swedish supermarkets contribute to the obesogenic food environment through their promotions. The two indicators described below will help to answer the question: which part of unhealthy food promotions by Swedish supermarkets would already be illegal by UK standards?

Indicator 1: share of unhealthy promotions

The share of unhealthy promotions as a ratio of total online food promotions.

Explanation

As a first step, we get an overview of all unhealthy food promotions, as a share of the total food promotions.

To our knowledge, there is no specific Swedish nutrient profiling model available that would enable us to classify individual products as 'unhealthy'. The Keyhole model, the official instrument supported by the government, was developed primarily to identify the healthier end of the food spectrum, not the particularly unhealthy end. In order to allow a good comparison with UK food regulation, we therefore apply the UK definition of unhealthy food (see box for explanation).

Definitions & calculation

From the webshop, we take into analysis all food products to which a promotion applies based on a temporary price reduction.

Products are classified as either *unhealthy* or *healthier* according to the 2004/05 Nutrient Profiling Model as developed by the Department of Health & Social Care in the UK (UK Health Department, 2011).

Product descriptions lacking essential data needed to calculate the HFSS classification will be marked as 'unknown'. Product groups with many products marked 'unknown' (for one or more webshops) may be left out of analysis for all supermarkets.

Indicator 2: share of unhealthy volume based promotions

The share of unhealthy volume based price promotions as a ratio of total unhealthy food promotions.

Explanation

As a further breakdown of indicator 1, we analyse the volume based price reductions separately. It is this type of promotion that causes the greatest raise in consumption according to recent research in the United Kingdom (PHE, 2015).

Again we use the British nutrition profiling model to distinguish unhealthy food products.

Definitions & calculation

From the webshop, we take into analysis all food products to which either a 'multibuy' or an 'extra-free' promotion applies (e.g. "2-for-1", "3rd product free", "XL for only £1,- extra", etc.).

Products are classified as (either or not) healthy according to the 2004/05 Nutrient Profiling Model as laid down by the Department of Health & Social Care in the UK (UK Health Department, 2011).

Product descriptions lacking data needed to calculate the classification will be marked 'unknown'. Product groups with many products marked 'unknown' (for one or more supermarkets) may be left out of analysis for all supermarkets.

Sustainability

Indicator 3: share of meat promotions

The share of meat promotions as a ratio of total online food promotions.

Explanation

Promotions can be regarded as an incentive to buy more than one had intended to buy. By promoting products, supermarkets stimulate purchasing and consumption of that product category. Because of the high environmental impact of meat we will focus on promotions for meat products. We will analyse the extent to which Swedish supermarkets promote meat products, and thereby stimulate the consumption of these products. In order to analyse this, we will map the amount of meat promotions per supermarket. Additionally, we will calculate the ratio of meat promotions compared to the total amount of promotions per supermarket. Using this ratio we can compare the different supermarkets to each other. Presenting the results, we will make a distinction between multibuy and other price promotions and a breakdown into a few high level meat categories, i.e. beef, pork, chicken, rest. This breakdown of results will provide extra information as multibuy/volume based promotions are considered to lead to more incremental consumption (PHE, 2020) and red meat (beef, pork) is linked to higher environmental impact.

Definitions & calculation

From the webshop, we take into analysis all food products to which a promotion applies based on a temporary price reduction.

All products categorised as 'meat' (or 'beef', 'pork', 'chicken' etc) in the supermarket's own categorisation count as a meat product.

Indicator 4: share of 'red' meat promotions

The share of promoted meat products that are labelled 'red' in the Swedish WWF meat guide as a ratio of total meat promotions.

Explanation

This indicator measures the extent to which the meat promotions of each supermarket are for products that are given a red light in the [Swedish WWF meat guide](#). In this guide WWF issues a 'warning' for these products, as they have a high environmental impact. To analyse this we will assess the origin of meat products and relevant certifications and measure the number of meat products currently in promotion that fall under these criteria. The results will be presented as a percentage of the total amount of promotions per supermarket and a breakdown per meat type. To measure the amount of products that fall into this category we will analyse the origin and certification of all chicken, pork and beef products for every supermarket.

Definitions & calculation

All products categorised as 'beef', 'pork' or 'chicken' in the supermarket's own categorisation will be included in the analysis. For other types of meat and products containing multiple types of meat we will have a separate category. This category will not

be measured along the guidelines of the Swedish WWF Meat Guide, as there are no specific guidelines available for all of these types of products.

For origin, we will collect the information from both the certification label *From Sweden* on the product page as well as mentions of the origin in the product description. Besides origin, the following certifications will be identified, as they cover products that are in the green or yellow category of the Swedish WWF Meat Guide:

- KRAV
- EU organic
- Svenskt Sigill Klimatcertifierad
- Svenskt Sigill Naturbeteskött
- Svenskt Sigill
- Label Rouge

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ANNEX 1 Definitions

multibuy promotion – a promotion that requires the shopper to buy one or more items to benefit from a discounted price compared to the price when bought separately. For example, 'buy one get one free', '3 for 2'; as well as types that state a fixed price or saving, for example '3 for £10' or 'buy 6 and save 25%').

extra free promotion – a promotion that occurs when an enlarged pack size is created by the manufacturer and where the pack label states that a proportion of the product is free. For example, an extra-large packet stating "50% extra free". This does not prevent a manufacturer from labelling products with volume promotions but restricts medium and large retailers from offering these for sale.