

and Food promotion overconsumption

An integrated debate about health,
environment and animal welfare

Questionmark

★
**BUY 1
GET 1
FREE**



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Summary

Part 1

Food promotion and overconsumption

We eat too much. Overconsumption in wealthy countries gives rise to growing problems for health, environment and animal welfare. At the same time, consumption is still encouraged. Increasing research shows almost every type of food promotion - ranging from signboards to influencers - leads to more consumption in its own way.

Concerns about food promotion are also growing and the public debate regarding food promotion is effective.

Recent years have seen an increasing number of regulations and restrictions, for example on child marketing. For now, the focus in the debate is on subtopics such as alcohol, soft drinks and cheap factory farmed meat volume discounts on meat. An integrated debate about the effect of food promotion on health, environment and animal welfare in conjunction is still missing.

Part 2

Multi-buys and overconsumption

Multi-buy promotions are a suitable subject to commence an integrated debate on food promotions. Multi-buys ('3 for the price of 2'), of all types of promotions, most directly lead to extra consumption. Consumers also do not benefit from this: they eat more than they had planned and they also spend more money.

Multi-buys are already under debate in multiple countries; the United Kingdom has even passed legislation to ban it. For the benefit of health, environment, animal welfare and consumers' wallets, it is important to regulate multi-buys in the Netherlands as well.

Part 1

Overconsumption and food promotion

Overconsumption of food leads to growing problems for health, animal welfare and environment. Now that these issues are becoming increasingly evident and urgent, it raises questions about the role of food promotion; to what extent should consumers be encouraged to eat and drink (more)? Part 1 takes stock of the debate about food promotion.



Food promotion contributes to overconsumption, which leads to growing problems for health, sustainability and animal welfare in the food system.

Introduction

The Dutch diet is not sustainable. First of all, it is unhealthy; the average Dutch person consumes more than twice the amount of sugar than the World Health Organisation recommends (WHO, 2020; RIVM, n.d.). Half of the Dutch population is overweight, leading to resulting in an epidemic of diseases including diabetes type II, cardiovascular diseases and (childhood) obesity.

In addition, our ecosystem simply cannot provide all this food. If every world citizen were to consume as the average Dutch person does, we would need at least 4 earths for agriculture alone (Global Footprint Network, 2022).

In part, these problems can be solved by consuming *differently*. Current government policy focuses on this by changing the composition of our diet step by step. For example, towards the direction of products in the Wheel of Five¹, the Dutch dietary guidelines, or towards a more plant-based diet.

Besides *shifting* our diet, also the total *amount* of Dutch

food consumption will need to decrease. The current diet of developed countries is characterised by overconsumption (WHO, 2002; UN, 2022).

We need to understand why people eat more than they need in order to be able to do something about it. Besides a range of other factors - it is obvious to look at the role of food promotion. While the problems in our food system are growing, consumption is encouraged at a large scale. The Dutch food industry spends about 1.6 billion euros per year on food promotion (Panteia, 2022).

¹ A tool provided by the Dutch Nutrition Centre which recommends five principle food groups that contribute to a healthy diet

Does food promotion contribute to overconsumption?

Promotion works. This is most visible on the overall economic level: if the investment in advertisement increases, this measurably leads to more consumption (for example: (Molinari en Turino, 2018) and (Brulle en Young, 2007)). How promotion works differs. Different types of promotion can have different effects.

Effects of food promotion

Although it is difficult to measure the direct effect of any individual advertisement on consumption, an abundant amount of evidence proves that (food) promotion influences people's behaviour. This behavioural change is not always a rational decision: the effect of advertising is often unconscious (Fennis en Stroebe, 2010). This is especially the case for luxurious food products and 'extras'. For example, promoting soft drinks with factual, rational arguments has little use;

soft drinks are not a basic need and the difference between brands are small (and a matter of personal preference). An advertiser will therefore rather try to associate a brand with a positive value such as youth or attractiveness (Fennis en Stroebe, 2010). These associations stick and demonstrably influence food choices. Recent research shows that this unconscious influence is largely unstoppable. Also those who know they are being influenced, are being influenced (Hütter en Sweldens, 2018).

Brand switching

This does not yet prove people consume more in an absolute sense due to promotions. By far not all promotion campaigns target consumption growth; advertisers often focus solely on growing their market share *at the expense of* competitors. The target of comparative advertising, for

example, is not to make people eat or drink more, but only to make them *switch* to another brand ('brand switching'). Supermarkets may, for example, present their own brand as an alternative to the same product of a premium brand. If the effect of such a campaign is limited to brand switching, the campaign itself is not harmful to society as a whole.



Comparative advertising is targeted at growth at the expense of another brand. Absolute consumption growth is not the target.

Consumption growth as an (indirect) effect

Also when a promotion is only *meant* to gain market share, the (side)effect can indeed be consumption growth. Brand promotion is also always (indirectly) promotion of a *specific type of product*, regardless of the brand.

An example is the marketing war between Pepsi Cola and Coca Cola at the end of the 20th century. In a short period of time, the two companies spent hundreds of millions on campaigns to influence people's brand preferences. Although the brands only managed to capture a limited market share from each other between 1970 and 1985, the total market for coke increased by 80 per cent in this period (The Economist, 2020).

Consumption growth as a target

In some cases, consumption growth is indeed promotion's main target. An example is the Cup-a-Soup advertising campaign in the 2000s, explicitly targeting

the introduction of a new consumption habit (Trouw, 1999).

Recently, McDonald's launched the service 'Order that Scene' (McDonald's, 2023), encouraging people to order McDonald's products that are shown in the movie they are watching. So, the target is not to get customers from another fast food chain to switch to theirs, but to introduce a new eating moment.

Another example is 'sales promotion'. This includes all types of promotion that give customers a (financial) nudge at the moment of purchase. For example: check-out bargains, savings campaigns, special promotions, etc. The effect of these promotion deals can be measured well using supermarkets' sales figures for example. These show that customers not only *switch* from one brand to another: people also eat *more* food as a result of sale promotions. More on this in part 2 of the document.



The 'Pepsi Challenge' targets market share compared against its competitors (Coca Cola). The effect, however, is growth of all coke brands.



Unilever and McDonalds create new reasons and moments to consume .

Normalising behaviour

Finally, food promotion in general helps normalise unhealthy and unsustainable consumption. What people consider to be 'normal', largely derives from what they see other people doing around them. Advertising can influence that perception by presenting high consumption as being normal (Thøgersen, 2014). This does not require advertising to specifically encourage purchase of the advertised product. People who see a lot of (online) advertising for unsustainable products, are generally more likely to engage in unsustainable behaviour (Frick e.a., 2021). An example of this could be Just Eat's commercial in 2020. In it, Katy Perry shows an unhealthy snack for every moment of the day. The commercial is probably meant as an exaggerated caricature of 'the good life', but also an unattainable ideal is an ideal.

Priority

A debate on the role of food promotion could target all these different effects. To determine priority, the effect that contributes most to overconsumption should be known. However, in practice making this determination is difficult. There is good reason for the well-known wisdom among marketers: "half of my investments in marketing are a waste of money, the problem is that I don't know which half". Even in controlled trials it is difficult to discover which promotion has which effect: it seems a combination of *different promotion techniques* leads to evident behavioural change (Zaidi e.a., 2019). Exceptions to this rule are 'sales promotions' (for example: check-out bargains or special offers). The effect of these types of promotions can be measured well, because they directly lead to extra sales. More on this in [Part 2](#).



"I get what I want when I want it." On behalf of Just Eat, Katy Perry shows the good life is accompanied by unhealthy snacks for every moment of the day.

Is the debate about food promotions effective?

The ideas about food promotion can change rapidly. Proof of this can be found in two articles in the newspaper 'Algemeen Dagblad', both on the topic of child marketing. In 1992 a detailed article explained that manipulating children is an effective marketing strategy. The editorial gives tips to entrepreneurs, such as: "make use of children's collecting mania wherever possible" or "make use of cartoon characters" (AD, 17-11-1992) (AD, 1992). Three decades later, the same newspaper places the fact that 'children are constantly being tempted' in an entirely different perspective: by now one in six children is overweight. The editorial gives advice on how to protect children against promotion of unhealthy food (AD, 14-12-2021) (AD, 2021). In 2015 the Advertising Code Committee strengthened the Food Code, especially for child marketing (Stichting Reclame Code,

2019). For example, the use of children's idols was partly prohibited as was advertising products specifically to children, depending on the specific nutritional criteria of the product and the age group of the advertisement. By now, some supermarkets have implemented their own policy preventing marketing to children, in any case on own brand packaging (Questionmark, 2022).

Parallel to the debate on child marketing, critique arose on tobacco and alcohol promotion. By now, it has led to a separate advertising code with rules of conduct for alcohol advertising and alcohol marketing. The law on alcohol also prohibits offers of more than 25 per cent on alcohol since 2021 (Overheid.nl, 2023).

Regulation on tobacco is more extensive. A near total ban on tobacco advertising took effect in 2003.



The newspaper 'Algemeen Dagblad' gave tips on how 'the critical child can be turned into a customer' in 1992. Thirty years later, the same newspaper gives advice on how to protect children against food advertising.



Examples of child marketing that the Dutch Advertising Code now prohibits: advertising candy in Donald Duck (top image, 2000s) and using children's idols on packaging (below image, 2010s).



Interestingly, the government went a step further in 2016, by switching to 'anti-advertising' or 'demarketing'. It became mandatory to warn smokers of the harmful effects

by placing gruesome images on cigarette packages. Furthermore, smoking products are only available in neutral packages without brand logos.

Attention from other interest groups?

Other interest groups have recently also expressed critique on food promotion. In 2010, Wakker Dier (Dutch Animal Welfare Organisation) coined the term 'cheap factory-farmed meat' for meat offers without a quality label for animals (Wakker Dier, 2021). Since then, meat advertising is a recurring topic in politics as well. The municipal council in Haarlem already voted to ban meat advertising in public spaces in 2021, due to the effects livestock and factory farms have on the environment. (NOS, 2022). Haarlem is the first city in the world to have made such a decision.

In the meantime, there is room for improvement on the topic of health as well. Self-regulation of child marketing,



For tobacco, government policy goes beyond a ban on advertising; producers are obliged to 'demarket' their products.

leaves lots of room for marketers in practice (MinVWS, 2022). For this reason, Secretary of State Van Ooijen announced to legally restrict child marketing (MinVWS, 2022). Furthermore, the debate is expanding from a focus on children to marketing in general. Over 80 per cent of the Dutch supermarket flyers are filled with unhealthy products (Questionmark, 2022). The Dutch Lower House voted in favour of multiple motions to change this.

An integrated vision for food promotion is still absent

As of yet, food promotion policy only targets subtopics separately. It is to be expected that the range of interests will reinforce each other.

In 2015 the Scientific Council for Government Policy (Wetenschappelijke Raad voor Regeringsbeleid, WRR) published the report 'Towards a Food Policy', calling for 'explicit food policy' that takes into account the cohesion between varying food values, including ecological sustainability and public health. The WRR also presents the problematic role of an "excess of advertising".

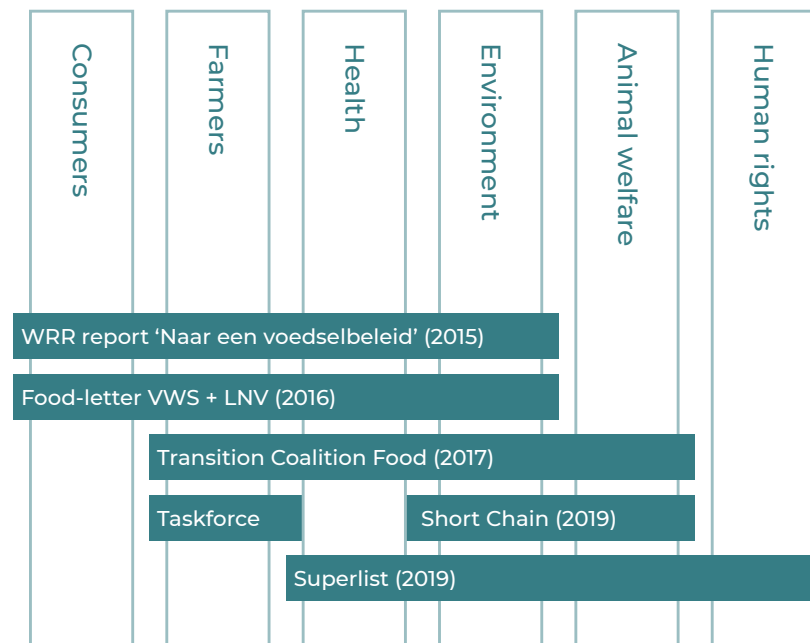
The following years multiple initiatives and organisations were created that recognise the food system as a topic connecting multiple societal themes.

Such an integrated vision is not yet evident for food promotion. The Food Transition Coalition (Transitiecoalitie Voedsel, TcV) comes closest. The coalition's vision

considers food advertising as part of the food environment that "constantly gives nudges for unhealthy and unsustainable behaviour" (Transitiecoalitie Voedsel, 2021). In 2022, the coalition presented a plan for the protein transition to the Minister of Agriculture, Adema. The coalition focused

on the reduction of advertising for animal products that do not fit into the Dutch dietary guidelines, the Wheel of Five (Schijf van Vijf) and banning multi-buys and price discounts on animal products (Transitiecoalitie Voedsel, 2022).

Figure 1. Schematic diagram of the cross-connections new initiatives have made since 2015.



Developments in the international debate

Critique on the contribution of food promotion on overconsumption is also growing in other European countries. Several different and corresponding developments can be relevant to the Netherlands as well.

- Recent initiatives have also been introduced in other countries that take an integrated approach to improving the food system, thus an approach from multiple interest groups simultaneously. Examples are [Food Foundation](#) (UK), [Eating Better](#) (UK), [EAT](#) (Norway), [Reformaten](#) (Sweden) en [Healthy Food Healthy Planet](#) (EU). At EU policy level, the 'Farm to Fork' strategy transcends the previously separated policy areas agriculture, nature, economy and public health.
- In some countries, the debate about animal products has a different emphasis. In Sweden, France and Belgium,

for example, the emphasis is not on *less meat* but on *better meat*. Better meat implies it results in less animal suffering. In practice *better* also means *less*, because ensuring animal welfare will raise the price of meat considerably.

The benefit of this frame in other countries is that there is less polarisation of the debate than in the Netherlands.

- The battle against childhood obesity has broadened rapidly in England. Child marketing was already regulated for some time. Since 2023, this regulation has expanded to include unhealthy food products and promotions in general, also those not targeted at children.

- A remarkable difference with other countries is the topic multi-buys. In the Netherlands, this has not been recognised as a separate topic, whilst critique is growing on this topic in other countries. More on this in [Part 2](#).

Conclusion part 1

While consumption is still being encouraged by multiple types of food promotion, overconsumption gives rise to growing problems for health, environment and animal welfare in wealthy countries. The past years, more regulations and limitations have come into force, for example on child marketing. As of yet, the focus is directed at subtopics such as alcohol, sugar and cheap factory-farmed meat.

An integrated debate about the effects of food promotion on health, environment and animal welfare in conjunction is missing. This debate should not replace existing discussions on child marketing, cheap factory-farmed meat or alcohol promotion, but can offer a broader foundation for these discussions.

Part 2

Multi-buys and overconsumption

Multi-buys on food is a relatively new topic in the Dutch food debate. It may lend itself well to start an integrated debate about food promotion. Part 2 of this whitepaper gives an overview of the knowledge about multi-buys, the debate in surrounding countries and the use of multi-buys in the Netherlands.



Examples of multi-buys in Dutch supermarkets' promotion folders.

What are multi-buys?

Multi-buys are temporary discounts only valid upon purchasing multiple products. There are several types, including 'buy 1, get 1 free', '3 for the price of 2' and 'stack discounts' where the discount increases for every extra product.

What is the effect of multi-buys?

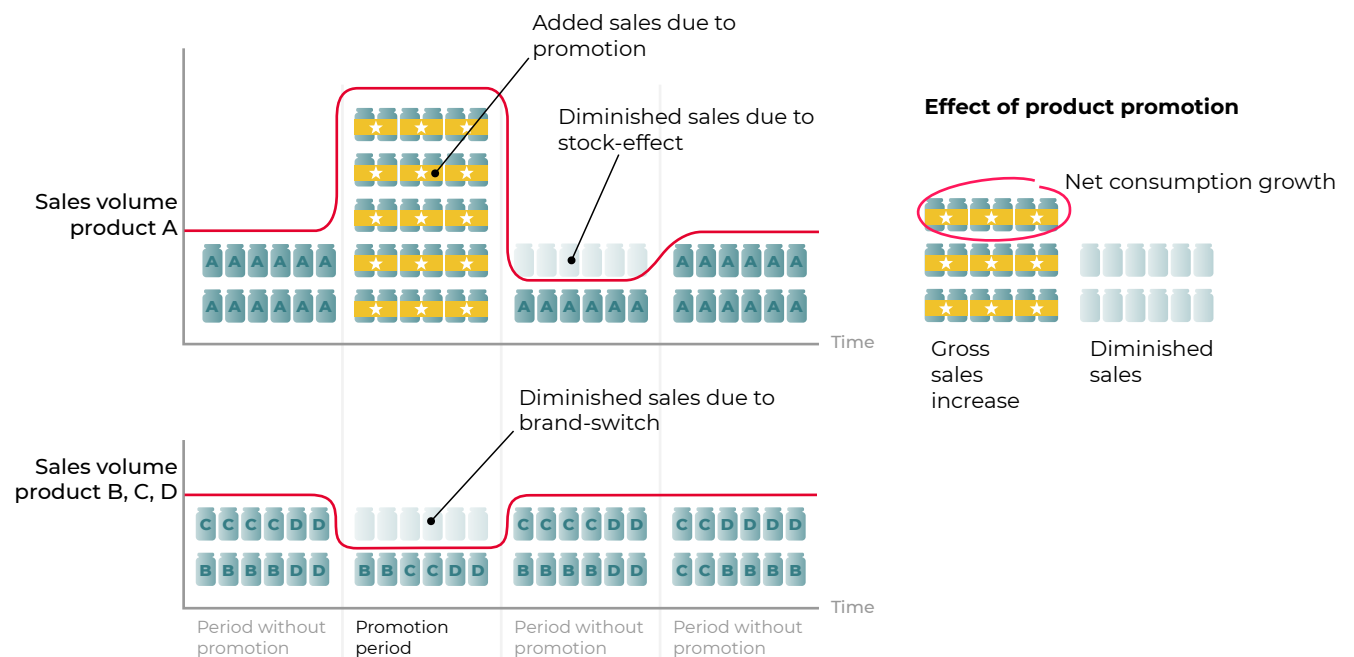
Multi-buys are a type of 'sales promotion'². Every sales promotion on a product has roughly three effects on sales (see figure x):

- Gross sales increase: First, the sales of the promotional product increase during the promotion period.
- Brand switching³: In the promotion period people buy less other brands that are not on sale. For example if brand A crisps are on special offer, people will buy less brand B, C, and D crisps.

- Stock effect⁴: Lastly, people buy less of a type of product for some time after the promotion period because they have stocked up on (part of) the extra

purchases. Their stock means they do not need to buy the product again for some time after the promotion period.

Figure 2. Schematic representation of the three most important effects of product promotion.



² Other types include check-out bargains, combination deals or temporary action discounts.

³ for easy reference of the diagram, this effect is completely displayed for other brands. In reality, it can occur within the brand: other products of the same brand are temporarily sold less.

⁴ For the clarity of the chart, the stock effect is completely displayed in the sales line of the promotion product. In reality, the stock effect is often spread over all brands. People who have crisps in stock of brand A, also buy less crisps of brand B, C and D. Furthermore, this effect can also be visible prior to the promotion period because consumers anticipate a promotion and postpone their usual purchases for a while.

To measure the effect of a promotion properly, it is important to subtract brand switching and stock effect from the gross sales increase. These two effects cover products that people would also have bought without promotion. Only if we set off these two effects we do know what the 'net consumption growth' is.

The net consumption growth not only covers the product that was promoted, but also presents the growth of the product category as a whole. The net consumption growth includes all sales in the product category, which would not have taken place without the promotion.

Multi-buys: highest net consumption growth

Recent research shows that of all types of promotion, multi-buys lead to the highest net consumption growth (PHE, 2020).

Up to 27 per cent of the products sold with a 'buy 1, get 1 free' promotion can be considered as the net increase in sales of the entire product category. In other words: more than a quarter of all products that consumers buy as 'buy 1, get 1 free', would not have been purchased without the promotion; also not from another brand or at another time.

There is reason to believe that these extra sales negatively affect health, environment and animal welfare, as well as other societal interests.

Impact on health

In the Netherlands, just like in other countries, particularly unhealthy food categories are on sale most frequently. On average, 80 per cent of the products in the Dutch advertising leaflets do not fit into the Dutch dietary guidelines, the Wheel of Five (Schijf van Vijf) (Questionmark, 2022). The extra consumption driven by

multi-buys, also mostly concerns consumption of unhealthy categories.

Several studies suggest that offers do not necessarily lead to food waste (van Lin e.a., 2023). It is plausible that for the largest part the net consumption growth as a result of multi-buys is consumed.

Impact on the environment

As remarked above, the relation between offers and food waste is unclear. On the one hand, consumer research among the Dutch shows the reason for throwing away food in 7 per cent of the cases is having purchased too much food (Voedingscentrum, 2020). On the other hand, studies suggest people waste *less* as a result of multi-buys, potentially because they are more conscious about the fact that they bought too much (van Lin e.a., 2023). The latter can be considered a positive effect of multi-buys on the environment.

It is important to keep apart the different definitions of 'overconsumption' (see Attachment). From an environmental perspective the difference between *too much food* and *wasting food* is not relevant; both are considered overconsumption. Every food product demands agricultural land, processing, transport and packaging, regardless of what the consumer does with it⁵. Net consumption growth involves the products people would not have bought without the promotion. To understand the effect on the environment, all these purchases are considered as overconsumption⁶.

The effect of multi-buys is extra problematic where it concerns relatively unsustainable products; products with animal ingredients for example, or other products with a high ecological footprint (for example, air-transported food).

Animal welfare

From an animal welfare perspective multi-buys are a problem when the promoted products contain animal ingredients. This does not only include meat and dairy products; animal ingredients are used in many products. Again, it is irrelevant whether the purchased products are actually eaten, or thrown away.

Salad spreads, pizza, fruit yoghurts; many products besides the categories 'meat, fish and dairy' contain animal ingredients.



⁵ So doesn't it make sense, for example, to 'save yesterday's leftovers from the bin' by eating them? Yes, it does make sense, but only if it means less 'new' food has to be prepared. If the leftovers are on top of the amount of food from a regular meal, then throwing them away is just as good/bad for the environment (and better for your health). Net consumption growth, which applies here, means products not bought from a need, but in addition to the food that people usually buy. Eating it, in this case, is never better or worse than throwing it away.

⁶ Of course that does not apply to every individual case but it does apply to the average consumer. If every world citizen were to eat as the average Dutch citizen we would need four earths for agriculture (Global Footprint Network, 2022).

Related societal interests

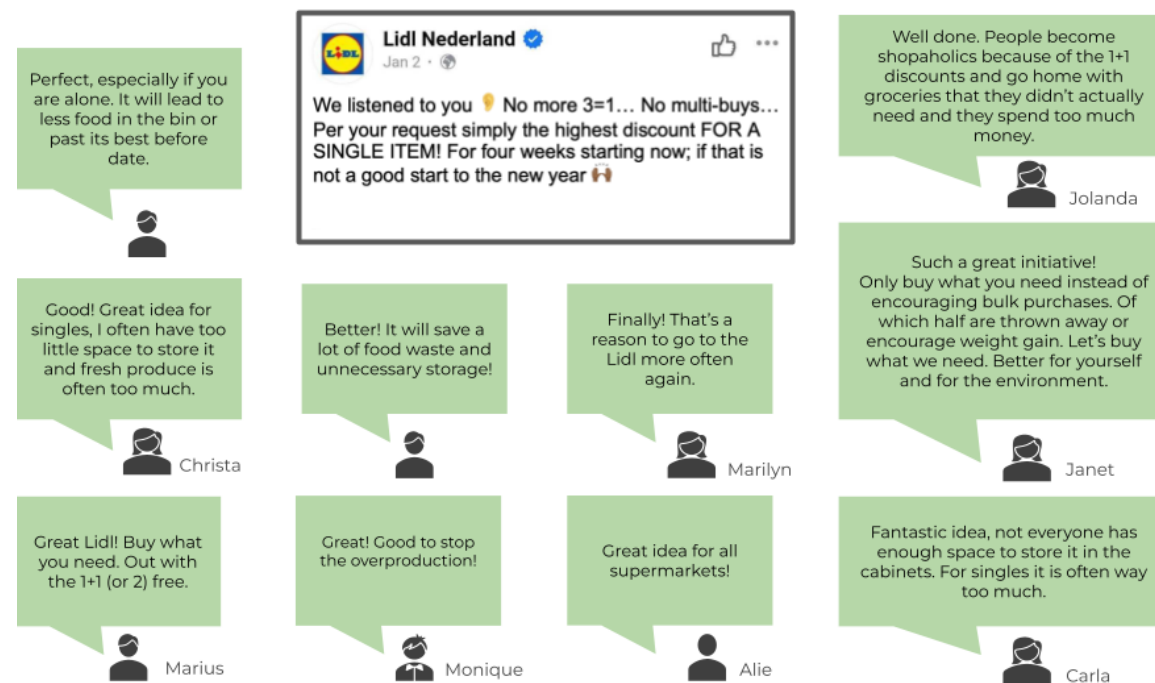
Besides the interests of health, environment and animal welfare, regulation of multi-buys can potentially expect support from other societal interests. Below we shortly summarise the most important two interests.

Consumers

Multi-buys cost consumers money. On average, the extra spending on multi-buys exceeds the savings from that discount. For British consumers, the yearly net loss is estimated at £14, about €17 (PHE, 2020). Discounts are often considered an important means to save money for households with a low income. This clearly does not apply to multi-buys. This takes out an important argument for keeping multi-buys. Moreover, many consumers apparently understand the disadvantages of multi-buys. As shown by the responses to Lidl's announcement to (temporarily) stop multi-buys.

ABN AMRO research from 2019 among consumers also shows that the majority of consumers considers banning multi-buys is (somewhat) acceptable, as long as they are replaced by another form of discount (ABN Amro, 2019).

Responses to Lidl's Facebook message (2-1-2023) that the supermarket will not offer multi-buys for a month.



Farmers

High discounts ('price stunts') are increasingly considered harmful to the (perceived) value of food in society. Furthermore, high discounts contribute to pressure on margins in the supermarkets' supply chains, which are already under pressure. Consequently, farmers (in the Netherlands but also abroad) often have difficulty keeping their company profitable, let alone invest in more sustainable agriculture.

A majority of the Lower House supported the Grinwis motion in 2022, requesting the government to seek legal instruments to limit high discounts on basic agricultural products including fruit, vegetables, dairy and meat (MinLNV, 2022; AD, 2022). The motion's applicants emphasise that food is expensive and farmers should be paid a fair price for their products.



Farmers protest at supermarket chain Jumbo against the distribution of burdens of the nitrogen crisis.

Multi-buys in surrounding countries

United Kingdom

The English parliament adopted a law to ban multi-buys on unhealthy products from October 2025 (GOV.uk, 2021). Parliament made this decision following scientific research into the causes of childhood obesity (PHE, 2020). Besides the ban on multi-buys, unhealthy products are no longer allowed to be displayed strategically in the shop, such as at the checkout, at the shop entrance or at the end of aisles.



Conservative prime minister Boris Johnson took the initiative to ban multi-buys.

2016; Questionmark, 2021). Aldi UK also no longer offers multi-buys, in anticipation of the legislation.

Sainsbury's

Before all supermarkets will have to adhere to the national legislation in 2025, Sainsbury's was the first supermarket in the United Kingdom to eliminate multi-buys since August 2016 (Sainsbury's, 2016; Questionmark, 2021). Aldi UK also no longer offers multi-buys, in anticipation of the legislation.

Denmark

In Denmark both discount supermarkets REMA 1000 and Lidl have implemented measures with regards to promotions to prevent food waste (Aarhus University, 2016). Both supermarkets no longer offer multi-buy deals on products and have

replaced multi-buys with single-product discounts. Instead of a 'one for the price of two' sign, products at REMA 1000 featured a sign saying 'get me, I'm single'.

REMA 1000 claims to have made this change because the supermarket chain sees multi-buys as the most important driver of food waste (REMA 1000, n.d.). Banning multi-buys means people will not buy more than they need.

France

In March 2019 France implemented a law to prohibit so-called 'super promotions', such as 'buy 1, get 1 free' (Légifrance, 2020). The law prohibits supermarkets from offering sales of more than 34 per cent off of the original food price. Moreover, using the word 'free' is no longer allowed in advertisements.

This legislation does not entirely ban

multi-buys, because the wording 'buy 2 and you will receive a third' (without the word 'free') still complies with the law.



The World Wildlife Fund in Sweden commissioned a research on the extent to which supermarkets apply multi-buys on meat. The organisation Reformaten, which focuses on health and sustainability of the food system, published a research on the use of multi-buys on unhealthy food. Based on this, a Swedish group of health experts called for regulation on multi-buys for unhealthy food (among others) (DN, 2023).



In 2023, the Christian Democratic party in Belgium called for a ban on 'buy 1, get 1 free' discounts on fresh products to stop the 'race to the bottom' on food prices (De Tijd, 2023).



In 2017, Ireland introduced an initiative to ban multi-buys, to counter food waste (Independent.ie, 2017). Supermarkets were only allowed to apply a discount on single products, instead of multi-buys. The agreement was signed by five large Irish supermarkets, collectively covering 70 percent of the market share of the Irish retail market.



Switzerland has an action plan to reduce food waste. One of the measures is to replace multi-buys on perishable products with a similar discount for a single product (Swiss Federal Council, 2022).

Multi-buys on food in the Netherlands

To get an idea of the use of multi-buys in the Netherlands, Questionmark researched the advertising leaflets of the biggest supermarkets⁷. During an eight week period⁸ Questionmark analysed the weekly advertising leaflets from Albert Heijn, Aldi, Dirk, Jumbo, Lidl and Plus. In total, over 22,000 products were on offer during the research period. Of those, 11,000 were multi-buy offers. In this research two groups of products on offer were analysed:

- meat (cold cuts and dinner) and
- 5 unhealthy⁹ product categories: crisps, salty snacks and cocktail nuts, biscuits and pastries, sweets and liquorice, chocolate, soft drinks.

For all these products¹⁰ the type of promotion was determined. We distinguish between:

- **Multi-buys**, as described above¹¹
- **Single price promotion**, where the

discount applies to the purchase of a single product, such as 10% off or from €2,49 for €1,99

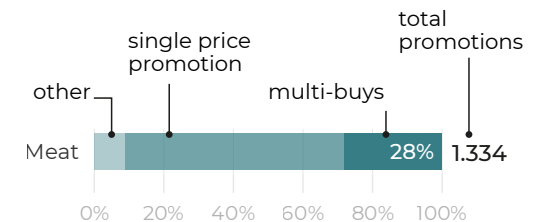
- **Other promotion**, such as products depicted in the advertising leaflet below the normal price. No discount applies to these products, but they receive extra attention.

Meat and animal ingredients

Multi-buys are also widely used for meat. During the research period, more than 1,330 meat products were on offer. Multi-buys are applied to more than a quarter (28 per cent) of the meat products on offer (figure 3).

As mentioned above, animal ingredients are also promoted *outside* the meat, fish and dairy shelves. A first analysis shows half of the products offered with multi-buys potentially contain animal

Figure 3. The division of the promotion types applied to meat.



proteins¹² (figure 4). This was certainly the case for 40 per cent of the products.

Unhealthy products

Multi-buys are the most frequently used discount on unhealthy products. For the selection of unhealthy products we found over 4,300 discounted products. The figure below shows the division of the types of promotions in the unhealthy product groups.

⁷ This research is limited to supermarkets because they are relatively the largest players in the food market. The Dutch buy about 70 per cent of their daily food in the supermarket (Rabobank, 2022).

⁸ week 16 through week 23 in 2022.

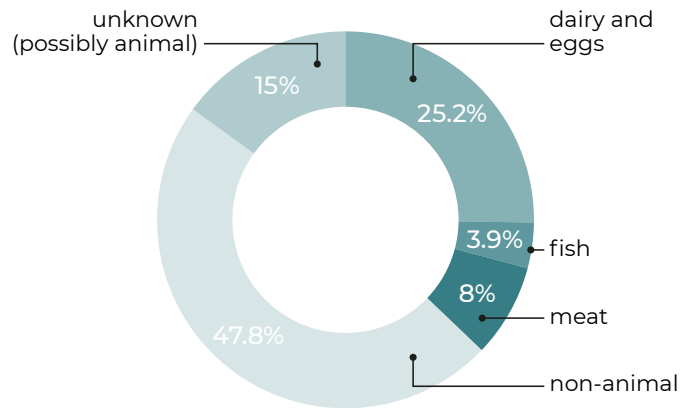
⁹ Unhealthy food means that it does not fit into a healthy food pattern, meaning that it does not fit into the Dutch dietary guidelines, the Wheel of Five (the five principal food groups of a healthy diet).

¹⁰ All products to which leaflet promotions apply were included, also products not depicted in the leaflet.

¹¹ Also packages with a temporary larger content (for example +15 percent content) offered at a particular price are included as multi-buys.

¹² Analysing ingredients of over 11,000 products offered with multibuy was outside the scope of this research. A first analysis presents an overview of the animal proteins in these products.

Figure 4. Estimate of the share of multi-buys with animal ingredients.



Remarkably, over half (56 per cent) of all products in the unhealthy product groups are promoted with multi-buys (see figure 5). After that, single price promotions are the most common (41 per cent). Multi-buys is the type of promotion most applied to every unhealthy product group, except for biscuits and pastries. Those are most frequently promoted with a single price promotion.

Figure 5. The division of all promotion types applied to the unhealthy product groups.

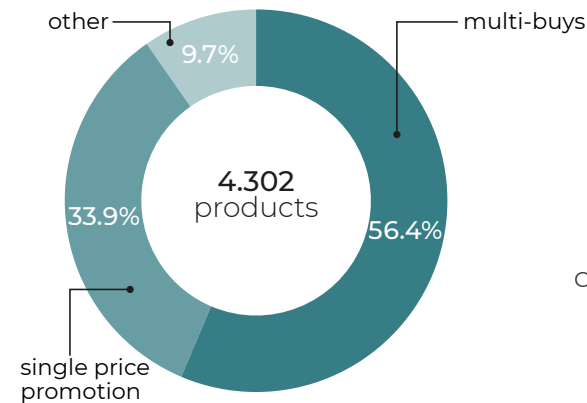
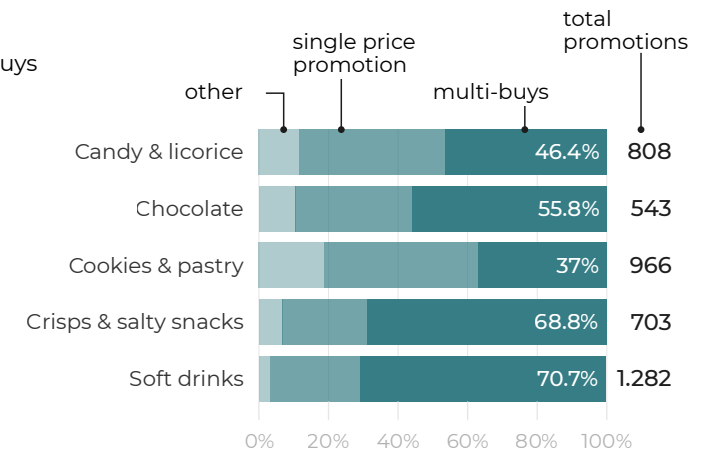


Figure 5 shows the division of the types of promotions across the unhealthy product groups.

Figure 6 shows that more than half of the offers within the product groups crisps, salty snacks and cocktail nuts, sweets and liquorice, chocolate and soft drinks were multi-buys. It is the most frequently applied promotion with these product groups.

Figure 6. The division of the promotion types across the unhealthy product groups.



In this respect, soft drinks stand out. In both absolute and relative numbers, supermarkets use multi-buys the most for soft drinks. Superlist Health 2022 also showed that four out of five advertising leaflets in Dutch supermarkets offer multi-buys on soft drinks (Questionmark, 2022).

Supermarkets' policies

Supermarkets' policies on multi-buys vary widely. Market leaders Albert Heijn and Jumbo give multi-buys a leading role in special campaign weeks, while Dirk and Lidl (partly) renounce multi-buys. This could be related to which price strategies supermarkets choose to follow (see textbox).



Albert Heijn and Jumbo

Albert Heijn's 'stock-piling weeks' ('hamsterweken') is the longest running campaign in the Netherlands (Adformatie, 2023). Besides this, Albert Heijn has implemented stack discounts on multi-buys, meaning every extra product that is purchased gives a higher discount. Jumbo has 'one extra product for free weeks' ('gratis eentje extra weken'), where customers can buy many products and receive a 50 per cent discount upon purchasing two products.



Plus and Aldi

It is not known whether Plus and Aldi have a vision on the use of multi-buys. In practice, both supermarkets offer multi-buy discounts.



Lidl

Lidl states on its website that fresh produce and 2-for-1 discounts can lead to food waste (Lidl, 2023). In January 2023, Lidl implemented 'buy 1=pay less' (1 halen = minder betalen) weeks in its folder for four weeks. With a few exceptions, it did not offer any multi-buys (Lidl calls them stack discounts).

Prior to Lidl's 'buy 1 = pay less' weeks, Lidl advertised 'mass is cash' ('massa = kassa') up to September 2023. This advertisement encouraged customers to buy more products.

Which of these strategies might return again is unclear. Further enquiries with Lidl did not yield more clarity about their policy for the future.



✓ Géén 3=1... ✓ Géén stapelkorting... ✓ Gewoon de hoogste korting per stuk!

Dirk van den Broek

Dirk van den Broek no longer offers multi-buy deals at all since 2022. Dirk gives the following reason: “At the end of 2021 the decision was made to no longer offer multi-buys to our customers (...). This not only saves them money, but it also saves food waste and you will not eat more than you need.”



Two price strategies

A supermarket usually follows one out of roughly two price strategies: 'High-Low Pricing' or 'Everyday Low Pricing' (EDLP). High-Low Pricing draws customers with high, temporary discounts. Multi-buys can be a part of this. This means the regular product prices are generally a bit higher in these supermarkets. EDLP keeps the regular product prices as low as possible. On the other hand, products are usually on sale less often, and discounts less high.

Effects of regulation

In the United Kingdom a ban on multi-buys on unhealthy products will come into force in 2025. In 2023 several similar measures were taken, including a ban on unhealthy check-out bargains. At this point it is unclear whether the legislation has loopholes that would allow promotions (in a different way) to still lead to overconsumption).

In Scotland a ban for multi-buys on alcohol was already in effect. A first study on the effects of this measure shows shopkeepers have switched to high discounts per product (Nakamura e.a., 2014). To prevent this from happening, policy on multi-buys should be accompanied by a limit on the level of discounts per product.

Visions on multi-buys in debate and policy

We presented this document to a number of experts. Below is a selection from their responses:

“Abolishing multi-buys could very well be more effective than VAT-reduction on fruit and vegetables.”

Jaap Seidell
professor nutrition and health,
Vrije Universiteit Amsterdam

“Multi-buy promotions considerably increase sales. But do not be mistaken: research shows that if multi-buys succeed in making consumers buy more coke for example, this is a result of the size of the multi-buy discount, rather than the fact that multi-buys imposes a quantity requirement. If retailers were to apply the same discount on single promotions, we might not make any progress.”

Bram Foubert
associate professor School of Business and Economics, Marketing & Supply Chain Management,
Maastricht University

“Our Guideline Food Environments already states that the price of a portion should be in proportion to the quantity - for example half a portion for half the price. These guidelines are already being applied to the catering industry, but the same idea applies to multi-buys in supermarkets. Multi-buys make it seem as though you receive a discount, but because you buy more, you eat more. Ultimately, you spend more money, while you eat more than you had planned.”

Jovanka Vis
Knowledge and communication manager Voedingscentrum

“Food promotions are omnipresent and seem normal. This could change rapidly, if support for, for example banning multi-buys, becomes evident. Scientific literature about ‘pluralistic ignorance’ furthermore

shows that societal support for measures is often larger than we think. The positive consumer response to Lidl's announcement suggests this support exists."

Jan Willem Bolderdijk

professor sustainability and marketing,
UVA

Multi-buys that lead to overconsumption and waste are problematic according to Milieu Centraal. Food and drinks have the biggest contribution to climate impact in an average Dutch household. Overconsumption and waste increase the climate impact of food and drinks unnecessarily. Within the CO₂eq share of food and drinks, meat accounts for 40% and all animal products together (meat, dairy, egg) account for 60% of the climate impact. Meat promotion (and other animal products) potentially lead to overconsumption and the resulting social norm are undesirable. Less overconsumption, for example

because people follow the Dutch dietary guidelines, the Wheel of Five (Schijf van Vijf) directly leads to benefits for climate and environment.

Multi-buys or other high discounts furthermore, normalise paying less for our food. This clashes with the true price of food, in which the effects on people and planet are incorporated. The sales price for unsustainable food differs greatly from the true price. If products are sold at a low price, farmers do not have sufficient financial resources to work sustainably. In this case environmental problems pile up. By stunting less with food prices and demanding the true price more often, farmers will be enabled to produce food in a sustainable way.

Paulien van der Geest

strategisch communicatieadviseur Milieu
Centraal

Judith Brouwer

senior onderzoeker Milieu Centraal

"A ban on stack discounts for animal products is a measure that is easy to implement and simultaneously has a great impact on the overconsumption of animals. This saves animal suffering, is better for the environment and products would no longer be sold below the cost price, thus better for the farmer. Which politician could say no to that?"

Sandra Beuving

director foundation supporting Animal
coalition

Conclusions and follow-up

While overconsumption of food leads to growing problems for health, environment and animal welfare, consumption is still being encouraged.

Over the past years, more regulations and limits have come into effect, for example on child marketing. As of yet, the focus is on subtopics such as alcohol, sugar or 'cheap factory-farmed meat'.

Still lacking is an integrated debate on the effect of food promotion on health, environment and animal welfare in conjunction. This debate does not need to replace existing discussions on child market, cheap factory-farmed meat or alcohol promotions, but can provide a broader foundation for these discussions.

Multi-buys

Multi-buy discounts are a type of promotion that lends itself well to start such an integrated debate. The effects of multi-buys are harmful for health, environment and animal welfare. Of all promotion types, multi-buys have the strongest direct effect on net consumption growth.

The topic has momentum, also from other interests:

- In surrounding countries multi-buys are already under debate. In the United Kingdom, a ban will even come into effect in 2025.
- Multi-buys are a temptation for consumers that are hard to resist, while they are not good for their health nor wallet.
- Multi-buys are a thorn in the side for farmers, because they put pressure on food prices and lower the value of food in consumers' perceptions.

Proposed policy

Multi-buys greatly contribute to overconsumption. To minimise this contribution, the specific policies described below could be a starting point for discussion.

Policy Responsible Sales Promotion Food in Retail

- Temporary food product discounts are never linked to the condition of buying more than one product
- Temporary discounts on single food products are never higher than 25 per cent of the regular price*

This policy applies to all food products: healthy and unhealthy, non-perishable and fresh products and regardless of their ecological footprint.

*unless the expiry date requires a higher discount to prevent food waste

To bring this proposal into practice, different actors in the Dutch debate and policy scene can fulfil different roles.

- **Supermarkets and food brands** can embrace the policy. Support in the industry is an important catalyst for development of government policy.
- **Scientists** can research the effects of a range of Dutch policies on overconsumption from different interests.
- **Civil society organisations** can expand support for this policy by making it part of their strategy and building this into existing and future campaigns. This applies to civil society organisations working on health, environment and animal welfare, but certainly also interest groups for example for consumers and farmers.
- To maintain a level playing field and ensure the harmful effects of multi-buys are effectively prevented, the **government** will ultimately need to enforce policy for all food retailers.

Appendix: explanation of terms

Overconsumption

The word ‘overconsumption’ is not a neutral, descriptive term. The prefix ‘over-’ expresses a judgement. This judgement suggests there is a **norm** on the amount that can or should be consumed, and a **value** that makes exceeding the norm a problem. In practice there is no generally accepted definition of ‘overconsumption’ and which norms and values this includes. When it comes to food, overconsumption is often used from one or two interests: health or environment. In the discussion on animal welfare, the term ‘overconsumption’ is used less, perhaps because the term would suggest that a certain amount of animal food products can be morally defended. However, we see that the animal welfare interest fits well into the debate about the effects of food promotion. For this reason we include

animal welfare as one of three interests. The table below shows how these three interests give a specific meaning to the term.

In this document we do not choose one of the three interests. The goal is to seek an approach to food promotion that unites these interests. We do speak exclusively about the consumption of food.

'Overconsumption' of food from the different interests			
	Health	Environment	Animal welfare
Norm	Consumers' health	The ecosystem's carrying capacity	Welfare of individual animals
Potential norms (what is 'too much'?)	WHO guidelines Guidelines Good Food Wheel of Five	Wheel of Five EAT-lancet report	'Better Life' programme
What does 'consumption' mean?	Eating or drinking	Buying, eating, drinking or throwing away	Buying, eating, drinking or throwing away
What is consumed too much?	Nutrients of which people's intake is generally too high (in wealthy parts of the world): for example salt, sugar and fat	Food in general or food with a relatively high ecological footprint, such as animal products.	Animal products (outside of the 'Better Life' programme)

Food promotion

This document exclusively focuses on food promotion as a driver of overconsumption. Promotion is one of four marketing elements, also known as the four 'P's of the marketing mix': Product, Price, Place, and Promotion (McCarthy, 1960). Promotion includes all commercial communication such as advertising and sponsorships, besides promotion through special promotions or discounts.

The influence of other marketing elements on overconsumption, such as fast food chains nearby schools (Place), overconsumption of unsustainable soy as livestock feed (product) or sometimes set low prices for unhealthy products (Price) are left outside the scope of this document. Also other (socio-cultural) factors that probably contribute to overconsumption of food but are not part of the marketing mix are excluded.

Examples or a range of (food)promotion types

TV-advertising	food influencers	supermarket leaflet
radio advertising	signboards	sports sponsorship
printed advertising	temporary price reductions	product placement
Recipe magazine supermarket	multi-buys	free refill
Sustainability claim	tasting (sampling)	cash-back deals
Child idols on packaging	combi-lunch-deal	online banners

Multi-buys

Multi-buys are a temporary discount that only apply upon purchasing multiple products. There are several types of multi-buys, such as '2nd product free', 'three for the price of 2' and '3 for €5' or the so-called 'stack discounts' where the discount increases for every extra product.

Other names for multi-buys are:

- Volume discounts
- Multi-unit promotion
- Bulk discounts
- Multi-pack discounts
- Stack discounts

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Colophon

Initiative and execution

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