

Superlist

Health

2022

Which supermarket makes healthy the easy choice?

SUPER
LIST



The supermarket is not yet a healthy food environment

SUMMARY

Supermarkets are doing little to make healthy eating easy. Promotions, assortment and shop design make unhealthy choices appealing. Measures to encourage the healthy choice are largely absent or not able to be judged, both in practice and in policy. These are the conclusions of Superlist Health 2022. This outcome is similar to two years ago; only Ekoplaza and Lidl have implemented substantial improvements.



70%

Roughly 70 percent of our daily food originates from the supermarket and supermarkets therefore have a large impact on our food consumption patterns. Over the past years, supermarkets have made (collective) commitments that they will encourage the healthy choice. These agreements are documented in the National Prevention Agreement (Nationaal Preventieakkoord), subagreement overweight.

Superlist Health maps the extent to which supermarkets contribute to achieving these goals. It is a follow up report to the first edition of Superlist Health, published

in 2020. Superlist is an initiative of Questionmark Foundation, developed in cooperation with the Alliance Nutrition for the Healthy Generation (Alliantie Voeding voor de Gezonde Generatie).

The research method for Superlist remains largely unchanged. In consultation with the Scientific Advisory Board, minor alterations were made to the method to reflect the most recent scientific developments and insights. In addition, more emphasis is placed on healthy nutrition for children in this edition. Prior to this research, supermarkets were given the opportunity to provide feedback on the research method.

Findings and ranking

Supermarkets continue to take insufficient measures to meet the commitments they have made to support a healthier food environment. Despite agreements in the National Prevention Agreement, the shop design, promotions and assortment continue to make the unhealthy choice the easiest choice in the supermarket. The outcomes of Superlist Health 2022 are similar to those of 2020. Only Lidl and Ekoplaza have implemented substantial improvements.



LIDL is the only supermarket to have set specific goals related to healthy food sales as a share of total sales, based on National Dutch standards the Wheel of Five (Schijf van Vijf) and for sugar and salt reduction. Furthermore, Lidl also reports on the progress of these goals.



EKOPLAZA is taking visible measures to stimulate the consumption of products within the Wheel of Five. For example, the share of healthy products in the flyers and the assortment has increased greatly.

Some supermarkets show marginal improvements.

JUMBO hands out free fruit to children in a large number of stores.

Dirk has published a commitment to remove unhealthy products at the check-out and documented this in an official policy.

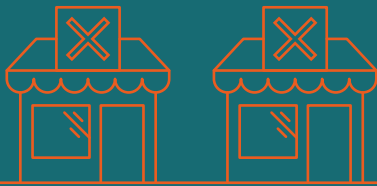
Other supermarkets have not implemented (measurable) improvements over the past two years. Four out of five products in the weekly flyers still do not fall within the Dutch National Standards, the Wheel of Five. Many supermarkets appear to have increased the share of unhealthy products in the weekly flyers. Additionally, flyers at all the large supermarkets contain weekly promotions for multiple types of alcoholic beverages.

The ambitions of the Prevention Agreement are not visible in the supermarkets' annual reports

Seven of the eight supermarkets researched do not publish whether they comply with the agreements in the National Prevention Agreement. Lidl is the only supermarket to publish their goals and the share of their sales as a percentage of total sales that meet the Dutch National standards, the Wheel of five. Jumbo and Albert Heijn report some information, although the definition they used for 'healthy' does not comply with the agreements made in the National Prevention Agreement.

Lidl is also the only supermarket to set goals to reduce the sale of house brand products with added sugar, salt, and saturated fat, and to report on their progress. Other supermarkets still do not provide data on the impact of their product improvement efforts on the sale of sugar, salt or saturated fat.

A positive development is that almost all supermarkets address children's health in their policy. For example, supermarkets are focusing on reducing marketing unhealthy house brand products to children.



1. Goals and reports

Score of the supermarkets on their goals on the issues: 'more healthy' and 'less unhealthy'

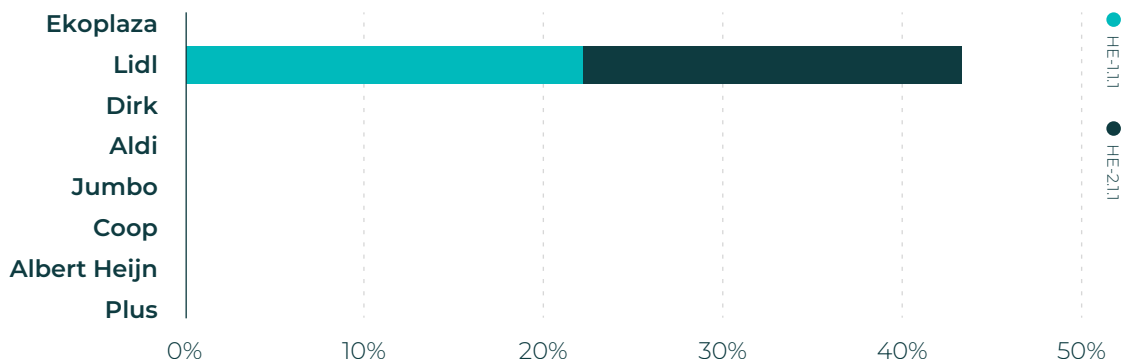


Figure 1. Supermarket's score for goals for 'more healthy' and 'less healthy'.

Assortment: Slight improvements visible

Unhealthy variants are usually still in the majority amongst product groups that fall within and outside of the Dutch National standards, the Wheel of Five. For example, cheese, meat (substitutes), crackers and 'beschuit'. On average, products that meet the Dutch National Standards, Wheel of Five are slightly better represented than in 2020. This slight improvement can largely be accounted for by Ekoplaza. Ekoplaza had an average five percent increase in the share of healthy products in the researched product groups. Ekoplaza has had a significant increase in the share of healthy products within the product groups potato, legumes, bread and bread mixes.

The goals set in the National Product Improvement Approach for salt and sugar reduction in 2030 are far out of reach for all supermarkets, for the researched product groups. Although almost all supermarkets show a reduction in the most salty products in the categories meat, meat substitutes and sauces. Albert Heijn and Ekoplaza come closest to reaching the goals to reduce sugar in soft drinks.

2. Assortment

Figure 2 shows how supermarkets' performances on assortment indicators are added to the ranking.

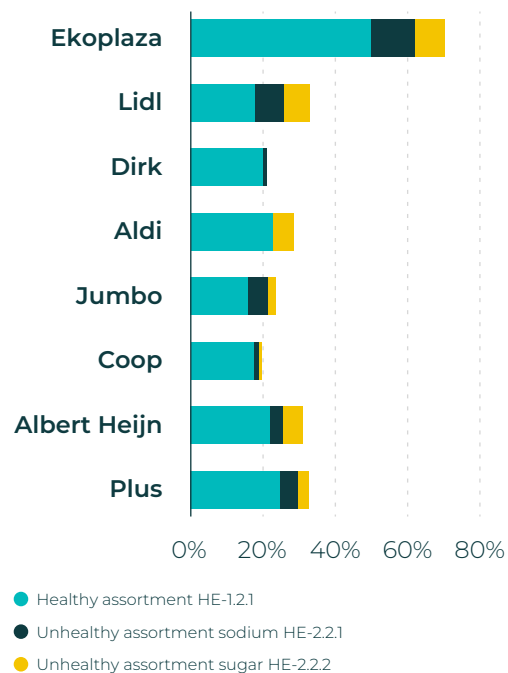


Figure 2. The score of the extent to which supermarkets stimulate the healthy choice through their assortment.

Promotion flyers: Offers mostly tempt consumers to purchase unhealthy choices

On average four out of five offers in the supermarket flyers do not meet the Dutch National standards, the Wheel of Five. Compared to 2020, Ekoplaza has visibly increased the share of Wheel of Five products in the flyers (from 19 to 30 percent), Albert Heijn has increased its share (from 18 to 20 percent). There is no improvement among the other supermarkets compared to 2020.

All supermarkets have put more alcoholic beverages on offer compared to 2020. All supermarkets have soft drinks on offer weekly, almost always as a multibuy (1+1 free).

A positive development is that the total number of offers for drink cartons for children seems to be decreasing. Lidl is the only supermarket to document this in a policy.

3. Promotions in the weekly flyer

Figure 3 shows how supermarkets' performances on flyer indicators are added in the ranking.

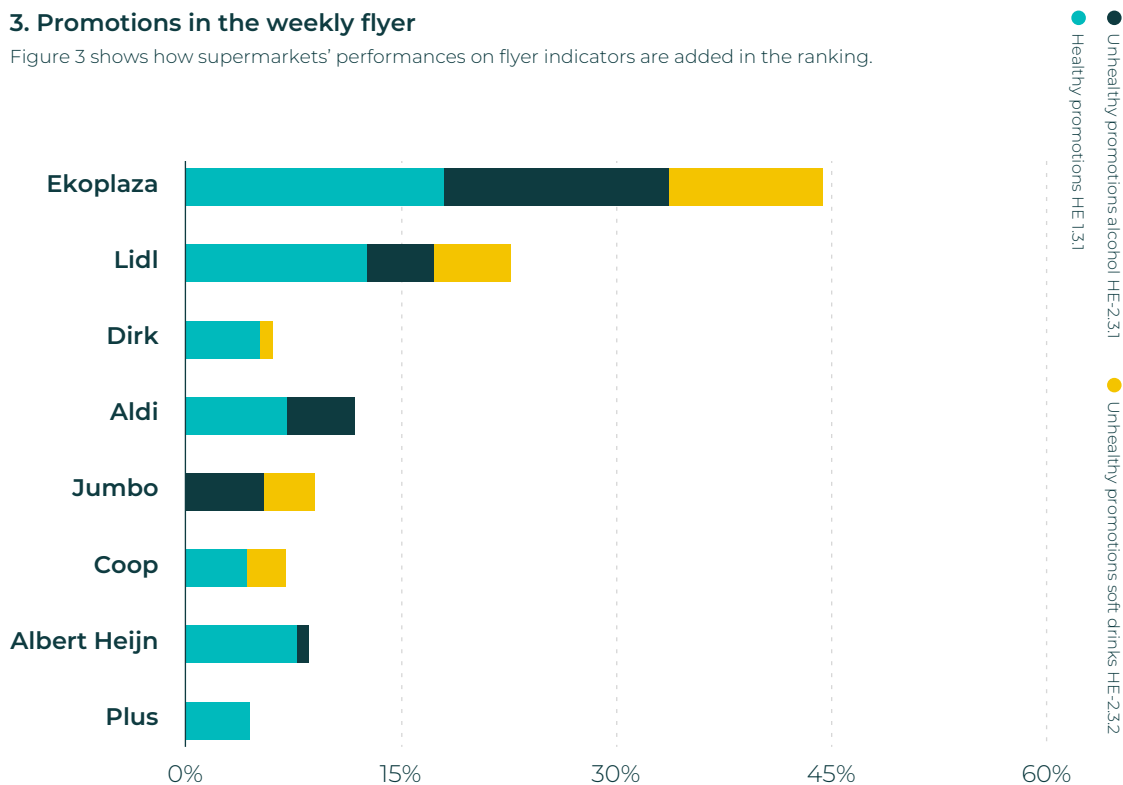


Figure 3. The score of the extent to which supermarkets promote more or less healthy food in the promotion flyers.

Shop design: Not focused on a healthy food pattern

Jumbo provides free fruit to children in (many) shops. Dirk uses colour codes on the shelf to help customers reduce their purchase of relatively unhealthy products. Other convincing measures to promote the Wheel of Five or discourage unhealthy choices were not found. The increase of aids to help choices such as the 'sugar indicator' or 'caloric measure' seem to have stagnated in many supermarkets.

All supermarkets - except for Dirk - still tempt their customers to unhealthy choices at the check-out. Often these unhealthy products target children specifically. Moreover, all supermarkets still market unhealthy products to children in multiple unhealthy product groups, such as breakfast cereals, soft drinks, desserts, and candy.





Bio Courgette
2x1/2
Origine: Belgique
Klasse: II 500g
GN: 404992810523
5,400

Bio Courgette
2x1/2
Origine: Belgique
Klasse: II 500g
GN: 404992810523
5,400

Bio Courgette
2x1/2
Origine: Belgique
Klasse: II 500g
GN: 404992810523
5,400

Bio Courgette
2x1/2
Origine: Belgique
Klasse: II 500g
GN: 404992810523
5,400

Bio

Bio

Bio

bio

BIO COURGETTE 500g
1,99

bio

BIO COURGETTE 500g
1,99

Overall ranking: Ekoplaza and Lidl increase the distance

The ranking for the supermarkets has changed slightly. Just like in 2020, Ekoplaza and Lidl are the frontrunners in the market. They have distanced themselves further from the other supermarkets, including former frontrunners Dirk and Coop.

Dirk's performance is similar to 2020, but has not improved much. This means it falls back to the middle class compared to the front runners. The same is true for Coop, which falls back to the laggards due to lack of improvement.



Figure 4. The ranking of the supermarkets, in which the scores for the indicators are shown by different colours.

Questionmark

check choose change

Stichting Questionmark

Overhoeksplein 2

1031 KS Amsterdam

info@thequestionmark.org

www.thequestionmark.org

SUPER
LIST 