

cut-price, what cost?

how supermarkets can affect your chances of a healthy diet

by Lucy Yates



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The content of the report and the views expressed within it are those of the NCC.

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Summary and key findings

This is the fourth in a series of reports in which we rate the UK's top eight supermarkets on how they help their customers shop, cook and eat more healthily. Our ratings are based on the salt content of supermarkets' own-brand foods, front and back-of-pack nutrition labelling, price promotions, prevalence of sweets at the checkout, and the information and advice the supermarkets make available.

With a two-year gap since our last report, we were expecting evidence of big improvements from the retailers on all our health indicators. Unfortunately, this was not the case.

We found 17 per cent more in-store promotions than in 2006, and 83 per cent more than in 2005. During the period of our survey, all the supermarkets we visited were offering far more promotions on fatty and sugary foods than ever before. Health advice¹ says that we should limit fatty and sugary foods to just seven per cent of our diets, but we found that these foods accounted for over half of all price promotions in the UK's leading retailers. Morrisons had the most fatty and sugary foods on promotion, with a whopping 63 per cent: up from 39 per cent in 2006. Only 12 per cent of retailers' promotions featured fruit and vegetables. Comparing this to our target level of a third, it is easy to see how far the supermarkets still have to go to help their customers choose and enjoy a healthier diet.

Sainsbury's comes top in our ranking for the second time in a row: it has made good progress in nutrition and labelling, and scores highly on customer information. The Co-op comes a close second, with a big improvement on its 2006 score. Tesco, the supermarket with far and away the biggest market share, comes in at a disappointing joint fifth place – falling down on own-label nutrition and labelling. Morrisons comes last for the fourth time in a row.

The NCC's Health Indicators

1. Nutritional content

- ▶ Salt content of ten everyday own-label processed foods.

2. Labelling information

- ▶ Use of front-of-pack, colour-coded signpost labelling in line with FSA criteria.
- ▶ Use of Guideline Daily Amounts (GDAs) for calories, fat, saturated fat and salt per portion.

3. In-store promotions

- ▶ The proportion of in-store promotions for healthy (fresh, frozen or canned fruit and vegetables) and less healthy, fatty and sugary foods.
- ▶ The presence of sweets and 'less healthy' snacks at the checkout.

4. Customer information and advice

- ▶ Promotion and provision of healthy eating information and advice in-store and via retailers' national telephone help-lines and websites.

Sweets at the checkout

The Co-op, Tesco and Waitrose all scored ten out of ten for not having sweets at the checkout. Morrisons and M&S are still failing in this area: both scored zero. All the checkouts in the stores we surveyed featured displays of fatty and sugary confectionary at child height.

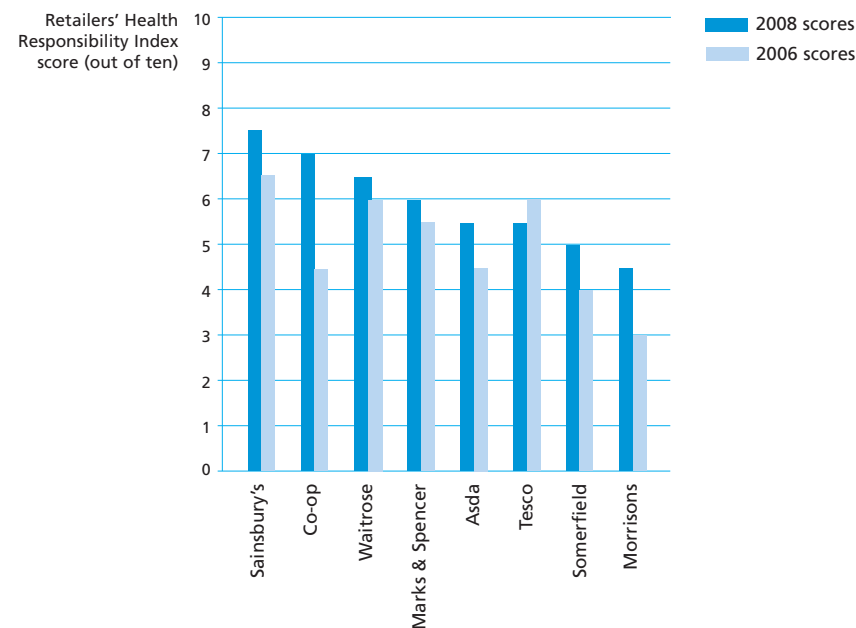
Salt

All our retailers have made improvements in the salt content of their standard products since 2006. Asda, the Co-op and Sainsbury's have achieved an impressive score of nine or more out of ten for the everyday products we surveyed meeting the targets set by the Food Standards Agency (FSA)². However, some are still lagging behind. Tesco, with the biggest market share, achieved the lowest score, with six of their ten standard products

surveyed not yet meeting the targets. A third of economy range products still fail to meet the targets, despite retailers saying they are giving special attention to these products.

Labelling

We used the FSA criteria to score supermarkets' front-of-pack labelling, which includes a colour-coded system showing high, medium and low levels of fat, saturated fat, salt and sugar per portion. Sainsbury's came top in this part of the labelling indicator: 30 out of the 35 own-brand products we surveyed carried colour-coded nutrition information.



Retailers' 2008 Health Responsibility Index score, compared to 2006

Notes: scores have been rounded to nearest 0.5

What we did

This year we chose Sheffield as our research site; all the retailers have stores there. Our findings are based on what we found in-store during March 2008. We recognise that some product data and practices may have changed since we undertook our survey.

The retailers have also supplied information on their company policies concerned with food and health. Summaries of the company policies can be found on our website at:
www.ncc.org.uk/cut-price-refs.pdf.

How did they score?

Our individual score cards for each retailer show comparative performance in this year and 2006.

Recommendations to retailers

- ▶ As policy, ensure that at least 30 per cent of price promotions are for fruit and vegetables, and run fewer multi-buy promotions on fatty and sugary foods.
- ▶ Remove all unhealthy snacks and sweets from checkouts.
- ▶ Move faster in reducing salt, fat, saturated fat and sugar in own-brand products, and meet the FSA salt reduction targets for all products by 2009.
- ▶ Roll out front-of-pack traffic light labelling to help shoppers improve the balance of their diets. Take on board the findings from the FSA's expected research (2009) evaluating front-of-pack schemes, to bring labelling into line with best practice.

The report cards

Sainsbury's

Co-op

Waitrose

Marks & Spencer

Asda

Tesco

Somerfield

Morrisons



Name: **Sainsbury's**

Date of report

March 2008

Comments – 1st place

Nutritional content

Salt content of own-brand foods against FSA 2006 target levels

Good improvement since 2006. All products met target except for standard cheese and tomato pizza, economy cornflakes and 'healthier' baked beans.

9½/10

7½/10

Labelling information

Use of colour-coded signpost labelling in line with FSA criteria

Clear leaders on front-of-pack signposting – 30 out of 35 products carrying front-of-pack signposting, all meeting FSA criteria.

12½/15

12½/15

Use of Guideline Daily Amounts

Lack of consistency. Only 21 of 35 products found had GDAs. Room for improvement here.

3/5

2/5

In-store promotions

Promotions for fruit and vegetables

A high number of promotions for fatty and sugary foods at 52 per cent. 15 per cent of promotions for fruit and vegetables – a slight increase from 2006.

4½/10

4/10

Snacks at the checkout

Disappointing slippage from 2006's full marks. A third of the checkouts displayed less healthy foods, and all of these checkouts had some fatty and sugary products at child height.

7/10

10/10

Customer information and advice

Leaflets and magazines

Good variety of healthy, seasonal recipes in magazine but no leaflets on healthy eating found in store on our visit.

2/5

2/5

Helpline

Very good helpline with knowledgeable and helpful staff. However, one question had inaccurate response.

4/5

3/5

In-store shelves, posters, etc

Five-a-day messages located around store and 'Active Kids' promotions prominent. But also strong promotions for fatty and sugary foods throughout the store.

3½/5

n/a

Website

Excellent website with useful advice and ideas for a healthier lifestyle.

4½/5

3/5

Overall comments

First place for the second report in a row. Clear leaders for front-of-pack labelling and good results for website and helpline information. Excellent progress on salt content with nearly all products meeting the targets. Concerning downward trend on balance of promotions and checkout displays in store.

7½/10

6½/10

Name:

Co-op

Date of report

March 2008

Comments – 2nd place

Nutritional content

Salt content of own-brand foods against FSA 2006 target levels

Good improvement since 2006 but still some work to do on standard and healthier baked beans, tomato soup and standard corn flakes to score a perfect 10.

9/10

7½/10

Labelling information

Use of colour-coded signpost labelling in line with FSA criteria

Good use of all FSA criteria for some products but inconsistencies present for colour-coding, nutrients given and per portion information on some products.

10/15

0/15

Use of Guideline Daily Amounts

About two thirds of products had full GDAs on pack. Room to improve on this in future.

3/5

1/5

In-store promotions

Promotions for fruit and vegetables

16 per cent of promotions for fruit and vegetables; an improvement from 12 per cent in 2006. 41 per cent of promotions for fatty and sugary foods; the lowest in the survey.

6/10

4/10

Snacks at the checkout

Full marks and the only store that displayed exclusively healthier items at the checkout, including fruit and nuts.

10/10

8/10

Customer information and advice

Leaflets and magazines

No in-store magazine found on visit.

1/5

0/5

Helpline

Excellent, informative helpline. Very knowledgeable and helpful staff. Top marks.

5/5

0/5

In-store shelves, posters, etc

Very good promotion of 5-a-day message throughout the store.

5/5

n/a

Website

Not much consumer-facing information found.

1/5

3½/5

Overall comments

In second place overall with good improvements on salt content of products and snacks at the checkout. Also had excellent customer helpline information. One of the healthier supermarkets in terms of balance of promotions. Need more consistency with GDA and colour-coded labelling.

7/10

4½/10





Name: Waitrose
Date of report: March 2008

Comments – 3rd place

	2008	2006
Nutritional content		
Salt content of own-brand foods against FSA 2006 target levels	8½/10	8/10
Labelling information		
Use of colour-coded signpost labelling in line with FSA criteria	7½/15	0/15
Use of Guideline Daily Amounts	4/5	3½/5
In-store promotions		
Promotions for fruit and vegetables	3½/10	7½/10
Snacks at the checkout	10/10	10/10
Customer information and advice		
Leaflets and magazines	3/5	2½/5
Helpline	2/5	2/5
In-store shelves, posters, etc	4/5	n/a
Website	3/5	4/5
Overall comments	6½/10	6/10
Some improvements since 2006 in salt content of products and labelling provision. Disappointing drop in promotions score with big reduction in amount of fruit and vegetables promoted. Could do better with customer helpline information but in third place overall.		

Marks & Spencer

Name: Marks & Spencer
Date of report: March 2008

Comments – 4th place

	2008	2006
Nutritional content		
Salt content of own-brand foods against FSA 2006 target levels	8½/10	8/10
Labelling information		
Use of colour-coded signpost labelling in line with FSA criteria	7½/15	0/15
Use of Guideline Daily Amounts	4½/5	4/5
In-store promotions		
Promotions for fruit and vegetables	7½/10	7½/10
Snacks at the checkout	0/10	2/10
Customer information and advice		
Leaflets and magazines	1/5	1½/5
Helpline	3/5	3/5
In-store shelves, posters, etc	5/5	n/a
Website	4/5	1½/5
Overall comments	6/10	5½/10
Top scorer for balance of promotions in store with 30 per cent of promotions for fruit and vegetables. However, must do more to cut sweets from the checkouts. Good progress made with colour-coded front-of-pack labelling but need to increase consistency across more products.		





Name:	Asda		
Date of report	March 2008		
Comments – Joint 5th place		2008	2006
Nutritional content			
Salt content of own-brand foods against FSA 2006 target levels	Improvement since 2006. Almost scored full points but sausages do not meet the FSA target. All other products found in standard, healthy and economy ranges met the criteria.	9½/10	9/10
Labelling information			
Use of colour-coded signpost labelling in line with FSA criteria	Inconsistent use of colour-coded front-of-pack signposting. Some products had full information, some partial and some had no information.	7½/15	0/15
Use of Guideline Daily Amounts	Inconsistent use of GDAs. Only 21 out of 33 products had GDA information and some of this was partial.	2½/5	1/5
In-store promotions			
Promotions for fruit and vegetables	Fruit and vegetable promotions have fallen from 22 per cent in 2006 to 15 per cent in 2008. Fatty and sugary foods are 52 per cent of promotions. Must work to reverse this trend.	4/10	4/10
Snacks at the checkout	Low score again with only a quarter of checkouts being snack-free. All checkouts with snacks had child-height displays.	2½/10	2½/10
Customer information and advice			
Leaflets and magazines	No leaflets found in store but magazine had information about 5-a-day and importance of exercise.	2/5	2/5
Helpline	Some good information given but some also inconsistent and inaccurate.	2/5	2½/5
In-store shelves, posters, etc	Little emphasis on five-a-day or health messages in store.	1/5	n/a
Website	Health section easy to find and good information on 5-a-day but could provide more information on important nutrition issues such as sugar or salt.	3/5	5/5
Overall comments			
Remains in joint 5th place in 2008. Scored poorly for balance of promotions in store and sweets at the checkout. High score achieved for salt content of products and good to see consistency across standard, healthier and economy product ranges. Improvements seen on GDA and front-of-pack colour-coded labelling but inconsistencies need to be tackled.		5½/10	4½/10

Name:

Date of report

Tesco

March 2008

Comments – Joint 5th place		2008	2006
Nutritional content			
Salt content of own-brand foods against FSA 2006 target levels	Tesco achieved the lowest score. Six out of ten products in the standard range and three out of ten products in the economy range did not meet FSA targets. Lagging behind; must do better.	7/10	6/10
Labelling information			
Use of colour-coded signpost labelling in line with FSA criteria	Only met two of the FSA criteria for front-of-pack labelling. No colour-coding to indicate level of nutrients.	5/15	7½/15
Use of Guideline Daily Amounts	Very good. Full marks for provision of GDAs per portion on all products surveyed.	5/5	4/5
In-store promotions			
Promotions for fruit and vegetables	56 per cent of promotions in store were for fatty and sugary foods, up from 26 per cent in 2006. Very disappointing eight per cent were for fruit and vegetables, down from 19 per cent.	2½/10	6/10
Snacks at the checkout	Full marks for the third report in a row.	10/10	10/10
Customer information and advice			
Leaflets and magazines	No leaflets were available in store but magazine had articles and recipes for healthy eating.	2/5	5/5
Helpline	Helpful staff but inaccurate information given.	1½/5	¾/5
In-store helpdesk	Some prominent and eye-catching promotions in fruit and vegetable section but these messages overwhelmed by promotions for fatty, sugary and salty products throughout store.	2½/5	n/a
Website	Good, easy-to-find information available.	4/5	2/5
Overall comments			
Disappointing score, dropping to 5th place in 2008. Achieved the lowest score in the nutrition indicator and scored poorly for the balance of promotions in store. However, full marks retained for no unhealthy snacks at checkout and full marks for GDA information on pack.		5½/10	6/10



Name:

Somerfield

Date of report

March 2008

Comments - 7th place

2008 2006

Nutritional content

Salt content of own-brand foods against FSA 2006 target levels

Some good improvements since 2006 but need attention on standard cornflakes and standard and economy sausages which still fail to meet FSA targets. Good salt reduction in 'healthy' range.

8 1/2 /10 7 1/2 /10

Labelling information

Use of colour-coded signpost labelling in line with FSA criteria

Only met two of the FSA criteria for front-of-pack labelling. No colour-coding to indicate level of nutrients.

5/15 0/15

Use of Guideline Daily Amounts

Very good. Top marks for GDA information per portion presented on all products surveyed.

5/5 2/5

In-store promotions

Promotions for fruit and vegetables

Promotions for fruit and vegetables fell from 19 per cent in 2006 to 13 per cent in 2008 whilst promotions for fatty and sugary foods rose from 33 per cent to 52 per cent.

4 1/2 /10 6/10

Snacks at the checkout

Disappointing fall in score. Over half of checkouts had sweets and snacks, all of which had child-height displays.

4 1/2 /10 5 1/2 /10

Customer information and advice

Leaflets and magazines

Good magazine with articles and recipes on seasonal, healthy food but no leaflets found in store.

2 1/2 /5 3/5

Staff helpful but provided inaccurate answers.

1/5 0/5

Helpline

Not many eye-catching promotions to promote five-a-day message though some labels on produce.

2/5 n/a

In-store shelves, posters, etc

Only basic information available.

1/5 0/5

Website

5/10 4/10

Overall comments

Some improvements since 2006 in salt reduction and excellent provision of GDA information, though with no colour coding. However, more work is needed to improve the balance of promotions in store and to remove unhealthy snacks from checkouts as well as better information provision for consumers online and on the customer helpline.



Name:

Morrisons

Date of report

March 2008

Comments - 8th place

2008 2006

Nutritional content

Salt content of own-brand foods against FSA 2006 target levels

An improvement since 2006 but several products still not meeting FSA targets. Three economy range products had more salt than their standard alternatives.

7 1/2 /10 6/10

Labelling information

Use of colour-coded signpost labelling in line with FSA criteria

Full nutrient information given per portion on 20 out of 29 products but no colour-coding given.

5/15 0/15

Use of Guideline Daily Amounts

20 out of 29 products gave GDA information. Improvement needed in consistency in application of information.

3 1/2 /5 1/5

In-store promotions

Promotions for fruit and vegetables

A huge 63 per cent of promotions were for fatty and sugary foods compared 39 per cent in 2006. Ten per cent of promotions for fruit and vegetables. Must work to reverse these unhealthy trends.

2 1/2 /10 3/10

Snacks at the checkout

No points. All 31 checkouts had fatty and sugary snacks, and some at child height.

0/10 4 1/2 /10

Customer information and advice

Leaflets and magazines

There were no in-store magazines or leaflets available on our visit.

2/5 2/5

Helpline

Some information given was inaccurate and questions not fully answered

3/5 1 1/2 /5

In-store shelves, posters, etc

Fruit and vegetables fairly well promoted within their own section but nothing else available throughout the store

2/5 n/a

Website

Some information available but could do better

2/5 0/5

Overall comments

Very poor rating. Morrisons come last for the fourth report in a row. They have improved their score on the salt content of products but still have work to do in this area. Must focus more on reducing the amount of fatty and sugary food on promotion and removing unhealthy snacks from the checkout as well as better information provision for their customers.

4 1/2 /10 3/10



1 Nutritional content of supermarkets' own-label foods

Salt content



Indicator: Salt content of everyday 'standard' own-label processed foods.

Target: FSA revised 'target average' sodium levels (2006).

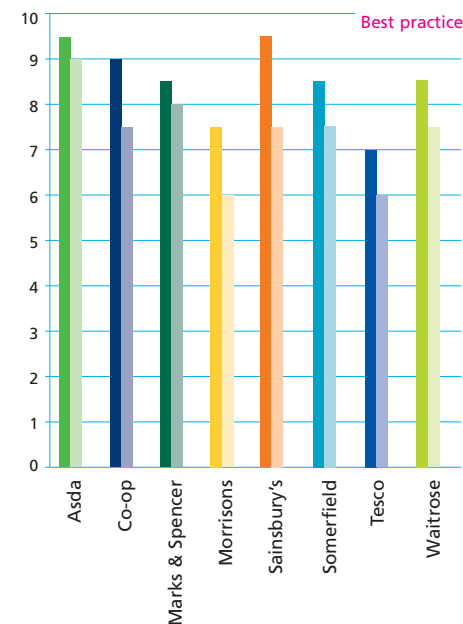
We gave retailers scores out of ten for the salt content of a sample of their standard own-label products – comparing results from 2008 and 2006.

We surveyed:

- ▶ pizza
- ▶ pasta sauce
- ▶ tomato ketchup
- ▶ baked beans
- ▶ fat spread
- ▶ tomato soup
- ▶ salt and vinegar crisps
- ▶ white bread
- ▶ corn flakes
- ▶ sausages.

As in 2006, we compared salt levels in the ten standard own-label foods to the FSA's 2006 'target average' for these food categories. We have given equal weight to each of the product categories.

All eight retailers have improved the salt levels in their standard products: some have reduced it significantly, while others have made small incremental steps towards the FSA salt targets. Three – Asda, the Co-op and Sainsbury's – have achieved an impressive nine (or more) out of ten for the ten everyday products. However, not a single leading retailer scored a perfect ten for meeting salt targets, even though the FSA first issued its salt targets for the food industry in 2003³. Asda and Sainsbury's were very close – but Asda's sausages still fall short of the target, and Sainsbury's pizza is also too salty.



Retailers' 2008 scores out of ten for the salt content of a sample of 'standard' own-label products, compared to 2006.

- ▷ Scores are based 2006 FSA salt targets, enabling year-on-year comparison.
- ▷ Scores are rounded to nearest 0.5.

■ 2008 scores
■ 2006 scores

Tesco, Somerfield and Morrisons are still lagging behind. Tesco has the lowest rating of all, with six out of ten products failing to meet targets. As Tesco has the greatest market share, the salt content of its own-brand 'everyday' food is likely to have a disproportionately large effect on our national salt intake, and this supermarket could do much more to take protect consumer health.

Out of 79 standard products surveyed, 26 (about a third) still failed to meet the FSA's salt targets. This is very disappointing, considering that these targets were relaxed in 2006 to make them easier to achieve.

Some products have seen little or no improvement since our last report in 2006. M&S' and Morrisons' tomato ketchups still scored poorly, with 2.9 and 3.5 of salt per 100g respectively, against a target of 2.5g. However, Asda, the Co-op and Sainsbury's ketchups had all achieved levels which were even lower than the FSA target; Asda's, the lowest, contained 1g of salt per 100g.

As in 2006, there has been little or no change in the salt levels of most of the supermarkets' cornflakes. Only Sainsbury's and Asda have met the FSA target. The Co-op, Morrisons, Somerfield, Tesco and Waitrose still have double the FSA target, with 1.5g salt per 100g. Kellogg's, the brand leader, is also still failing to set a good example, with 1.75g salt per 100g.

Economy ranges

There were own-brand economy products in some of the stores we surveyed, but some retailers had none or only a very few (Waitrose had one, the Co-op two, M&S none). In view of this incomplete data we chose not to score the economy range products. In total we looked at 44 economy products and were disappointed to find that only 30 of these (68 per cent) met the FSA salt targets. However, this is nearly twice as much as in 2006, when only 35 per cent of products – 17 out of 49 – met FSA criteria.

In most of the supermarkets with own-brand economy lines, at least one or two economy products fell short of salt targets; Somerfield and Tesco had three products each that did not meet the targets. Asda and Sainsbury's both stocked nine out of the ten surveyed products, with two of these falling short of targets. However, some products – such as Asda's white bread and Sainsbury's

salt and vinegar crisps – had done even better and exceeded the FSA targets. And at Morrisons, out of the six economy products we found, only the pasta sauce fell short of the FSA target, with 1.25g of salt per 100g, against a target of 1g per 100g.

We found little consistency in terms of whether buying economy products means that a consumer would end up with a saltier, or less salty, diet. Four out of ten Asda and Tesco economy range products we surveyed – and three out of ten of Morrisons, Sainsbury's and Somerfield's – contained less salt than the standard range products. Four of the products we found at Asda, and three at Morrisons, Sainsbury's and Somerfield, had more salt than the standard products. Although retailers have made some progress in meeting FSA targets, they must work harder to make sure that economy products are just as healthy as their standard lines.

Healthier ranges

We found 'healthy eating' ranges in all of the stores we surveyed but in some stores we found only three or four of our surveyed products in these ranges. As with economy ranges, incomplete data meant that we did not include these products in the overall score.

This year, 39 out of 42 products we surveyed in the 'healthier' ranges met the FSA salt targets. This is an improvement on 2006, when only 30 out of 43 products surveyed met the target. Generally, we found that nearly all 'healthier' own-label foods tended to be lower in salt than their standard versions. However, there were some exceptions. The Co-op pasta sauce, which contained 0.75g salt per 100g compared to 0.5g salt per 100g in their standard range.

Morrisons' salt and vinegar 'healthier' crisps contained 2.5g salt per 100g compared to 1.7 per 100g in the standard packet. Their 'healthier' sausages contained 0.4g salt per 100g compared to 0.3g per 100g in the standard sausages. Sainsbury's 'healthier' baked beans also contained higher salt levels than the standard product with 1g salt per 100g, compared to 0.79g per 100g. These also failed to meet the FSA target of 0.79g salt per 100g. Two other products – Tesco and Asda's 'healthier' sausages – also failed to meet the FSA targets.

What the companies told us

Asda claims to be the first retailer to meet the FSA's 2010 salt targets ahead of deadline.

The **Co-op** says the vast majority of its products will be compliant by the end of 2008, with the rest planned for completion in 2009. In March 2008, 66 per cent of its products met the FSA salt targets.

M&S says it has achieved 60 per cent of the FSA salt targets. It will continue to drive salt reduction across all its foods, aiming to meet all the FSA's salt reduction targets by 2010.

Morrisons says it aims to meet the FSA's 2010 salt targets early.

Sainsbury's says it has achieved the salt targets for over 80 per cent of its product lines, including all sandwiches and breakfast cereals. Its new Kids range, with 72 products aimed at 4-to-8-year-olds, has the lowest salt levels in any big retailers' own-brand kids' range.

Somerfield told us that approximately 80 per cent of its products meet the FSA salt targets. The rest of its products will be brought into line by the end of 2009.

Tesco says that 75 per cent of its products now meet the FSA salt targets. They are continuing to reduce the salt content in their sausages; all will be below FSA target by October 2008.

Waitrose says that all its newly developed products meet the FSA salt targets, with the exception of bacon and cheese.

Fat, saturated fat and sugar

As in previous surveys, we examined the total fat and saturated fat content of a small sample of own-label standard foods:

- ▶ cheese and tomato pizza;
- ▶ crisps (salt and vinegar flavour); and
- ▶ pork sausages.

FSA definition of a 'lot' and a 'little':

Fat – a 'little' is less than 3g per 100g and a 'lot' is more than 20g per 100g.

Saturated fat – a 'little' is less than 1g per 100g and a 'lot' is more than 5g per 100g.

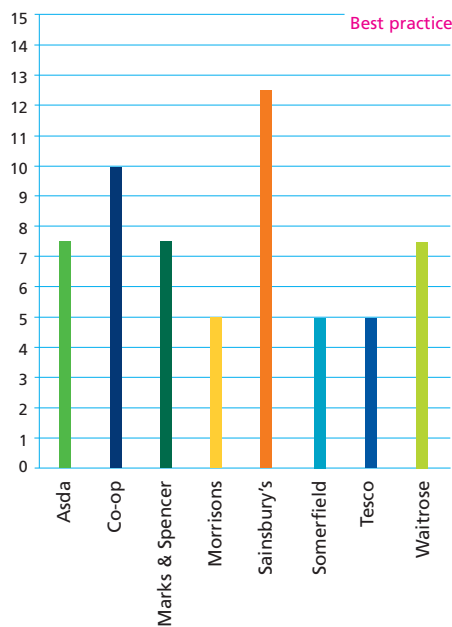
As with salt levels, we found variations in the fat or saturated fat content of products from different retailers. Morrisons and Somerfield had the fattiest standard sausages, with 24.9g and 23.9g of fat respectively – much higher than the least fatty standard sausages (Waitrose, with 13.1g total fat per 100g). The amount of fat and saturated fat content in Morrisons and Somerfield sausages has actually gone up from previous years. All other retailers had improved the overall healthiness of their sausages, with less fat and saturated fat in them.

A similar picture emerged when we looked at economy sausages. At five of the supermarkets the fat and saturated fat content had either gone down since 2006, or had stayed the same. But at Morrisons, Somerfield and Tesco the total fat and saturated fat levels in economy sausages had actually gone up.

When it comes to cheese and tomato pizzas, the picture is less rosy. The Co-op, M&S, Morrisons, Sainsbury's and Waitrose had all increased the fat and saturated fat content since our previous survey. We find this very worrying, considering that this is one of the most popular foods in the UK. However, Somerfield and Tesco had reduced both the fat and saturated fat; and, while the Asda pizza had more fat, less of it was saturated fat.

The good news is lower saturated fat levels across the board in own-brand salt and vinegar crisps. Since 2006 it has gone from 15g to 4g at the Co-op, from 12.2g to 3.2g at M&S, and from 14.9 to 3.8g at Morrisons. All the retailers we surveyed have brought their saturated fat down to 'medium'⁴, with Waitrose the lowest at 2.6g.

2 Labelling information



Retailers' 2008 scores out of fifteen for colour-coded signpost labelling in line with FSA criteria

► Scores are rounded to nearest 0.5.

Indicator: use of colour-coded signpost labelling in line with FSA criteria.

Target: use of FSA criteria, as follows:

- provides information on levels of four key nutrients – fat, saturated fat, sugar and salt;
- uses red, amber and green colour-coding to indicate at a glance whether the level of each nutrient is 'high', 'medium' or 'low';
- provides information on the level of each nutrient present in a portion of a product; and
- uses nutritional criteria developed by the FSA to determine the colour code.

We have used these FSA criteria to score the retailers' use of colour-coded front-of-pack signpost labelling, giving credit to supermarkets for how consistently this was applied across all the products we surveyed. None of the stores we surveyed stocked all of the product ranges we were looking for, so the score was based on the proportion of their products that were labelled.

All retailers now have some form of front-of-pack labelling, unlike in 2006 when only Sainsbury's and Tesco did. We have therefore changed the weighting of the scores slightly for this indicator, giving more equal weight to the number of products with front-of-pack labelling and adherence to FSA criteria than previously.

Currently consumers encounter a confusing array of supermarket labels, containing different types of nutrition information. We found three different front-of-pack

nutrition labelling schemes being used by the eight retailers that we surveyed, namely:

- colour-coded signpost labelling, showing consumers whether a food is 'high', 'medium' or 'low' in certain important nutrients for health, using red, amber and green colours;
- numerical GDA labelling, listing important nutrients for health, and showing the percentage contribution of each nutrient to the daily recommended amount;
- a combination of these two approaches, with GDAs given, and colour-coded as a guide to whether these are 'high', 'medium' or 'low'.

We consider the FSA's colour-coded signpost labelling scheme to be best practice, giving consumers at-a-glance information on the nutritional content of a product.

Sainsbury's came top in this indicator: 30 out of 35 own-brand products were labelled with colour-coded nutrition information, giving it a score of 12.5 out of 15. The Co-op scored ten out of 15, but there were inconsistencies in its product labelling. Some products met all the FSA criteria and others only met one or two. Asda, M&S and Waitrose all scored 7.5 out of 15, with inconsistencies in the type of front-of-pack labelling on different products.

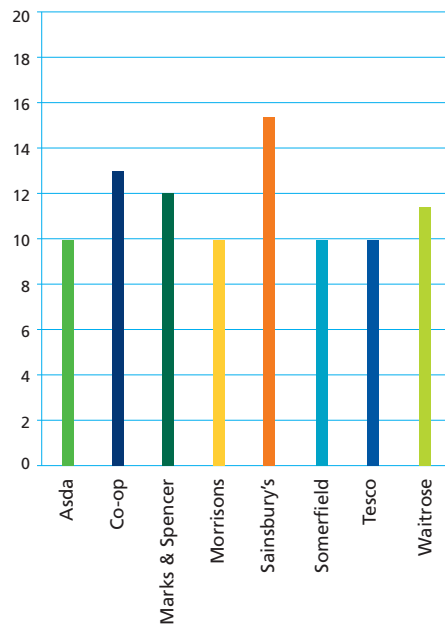
The FSA has recommended⁵ that retailers start with processed foods for front-of-pack labelling, and then expand the scheme where appropriate. In Asda, M&S and Waitrose, we found products that are on the priority list that still hadn't been labelled, two years after the creation of this list. In Asda we found that cornflakes, and both the standard and the value cheese and tomato pizzas, were not labelled this way. In both Waitrose and M&S,

sausages lacked front-of-pack nutrition labelling. Consumers can find it difficult to understand the nutritional content of processed foods⁶, so it is important for retailers to improve consistency in their labelling – as well as the extent of their labelling on the priority foods.

Somerfield, Tesco and Morrisons provided full nutrition information per portion, but they all fell down on two of the FSA's key criteria: red, amber and green colour-coding and FSA nutritional criteria on whether a product is 'high', 'medium' or 'low' in a nutrient. This meant that all three retailers scored only five points out of 15 for this part of the indicator.

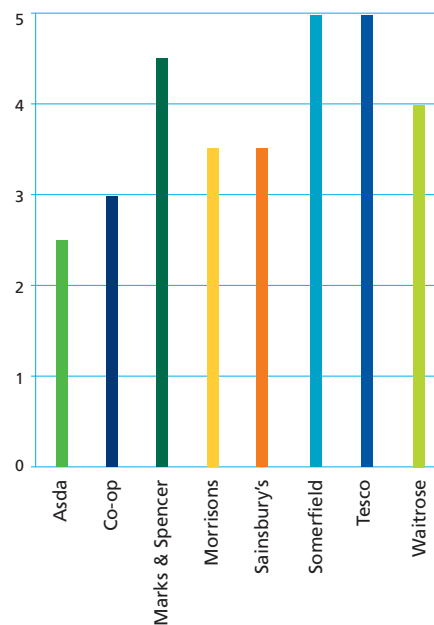


Guideline Daily Amounts



Retailers' 2008 combined scores for labelling of GDA and FSA criteria (out of 20)

Scores are rounded to nearest 0.5.



Retailers' 2008 scores out of five for the provision of GDA information

Scores are rounded to nearest 0.5.

Indicator: use of GDAs for calories, fat, saturated fat and salt

Target: all products to routinely declare GDAs for calories, fat, saturated fat and salt per portion

For the past three rating retailer surveys, we have rated retailers on their use of percentage Guideline Daily Amounts (GDAs) on back of pack. Because of changes in front-of-pack labelling schemes with GDAs, in 2008 we have given credit for GDAs used on either front or back. We have scored retailers on the percentage of products we found that displayed GDA information. Where we also found colour-coded information, this was scored separately in the previous section.

We were disappointed that many of the problems we identified in 2006 still ring true in 2008, despite retailers having had two years to improve in this area. There are still big inconsistencies. Asda, the Co-op and Morrisons are lagging behind, with very similar products given different and inconsistent labelling. For example, the Co-op provided GDAs on its 'healthier' baked beans, but not on its standard or value varieties. Morrisons gave GDAs on its standard and 'healthier' tinned tomato soup, but not on the value range. Asda had the lowest score: only 57 per cent of the products we found had GDA labelling at all.

We did find some examples of good practice – both Tesco and Somerfield had GDA information on all their products. However, none of these were colour-coded to give guidance to consumers on what the percentages might mean in practice.

What the companies told us

M&S uses its 'Eat Well' sunflower logo to signpost healthy options for customers, and will be rolling out colour-coded front-of-pack labelling schemes on breakfast cereals throughout 2008. By the end of 2008, the Co-op will have put colour-coded front-of-pack nutrition labels on all the FSA priority products, and on others as they are re-branded. GDAs per portion will be included on this packaging. Tesco, Sainsbury's and M&S have told us that front-of-pack labelling has encouraged the reformulation of their products.



3 In-store promotions

Indicator: the proportion of in-store price promotions for healthy (fresh, frozen or canned fruit and vegetables) and less healthy (fatty and sugary) foods.

Target: 33 per cent, the percentage we are advised that fruit and vegetables should make up of our total diet, and seven per cent, the percentage of our total diet that fatty and sugary foods should be limited to, respectively.

Indicator: the presence of sweets and 'less healthy' snacks at the checkout.

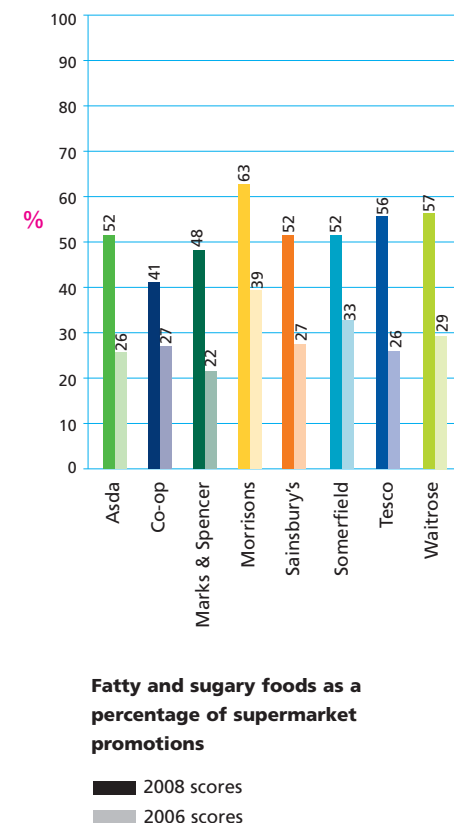
Target: no checkouts to display sweets, unhealthy snacks or drinks (particularly at child height).

With the credit crunch pinching more and more, in-store price promotions – with incentives such as price reductions or multi-buy offers – are critical in influencing people's food purchases, and thus their eating habits. We counted over 4,300 price promotions over the eight stores we surveyed, 17 per cent more than in 2006. As in our last study, Asda had the most price promotions of all – 1,588 food and drink products on promotion in just one store, compared to 810 in 2006.

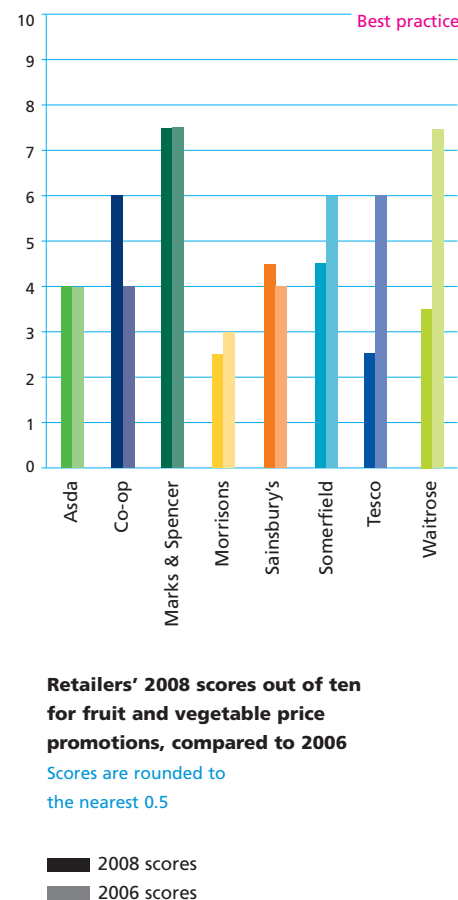
We wanted a snapshot of how well the leading supermarkets are promoting good health through the overall balance of promotions in-store. Food prices are currently high on the public and political agenda, and retailers are focusing even more on special offers, prompting customers into multiple purchases for a discounted price. In most of the supermarkets, most of the time,

we found this type of promotion dominated by confectionery, fatty, sugary and salty snacks, and sugary soft drinks.

When we added up all the price promotions for fruit and vegetables in the survey, we found that only 12 per cent of all products on promotion fell within this healthy staple food group. Comparing this to the target level of 33 per cent, it is easy to see that the supermarkets still have a long way to go to help us choose and enjoy a healthier diet. Health advice⁷ is that we should limit fatty and sugary foods to just seven per cent of our diets, but we found that these foods accounted for over half of all price promotions in the UK's leading retailers – a staggering 54 per cent in total.



The survey took place just before Easter and we found prominent Easter egg and Easter cake promotions in all of the stores. To prevent Easter promotions having an undue influence on our results, we have excluded all overt Easter promotions from our calculations.



We were disappointed to find that the percentage of promotions featuring fatty and sugary foods had risen significantly in all eight supermarkets. Morrisons had the most fatty and sugary items on promotion, with a whopping 63 per cent – up from 39 per cent in 2006. Sainsbury's came next, with 63 per cent of their promotions featuring fatty and sugary foods – over double 2006 levels, up from 27 per cent. Even the lowest scores – the Co-op's 41 per cent and M&S' 48 per cent – are still many times the recommended seven per cent⁸, up from 27 and 24 per cent respectively in 2006.

There were some exceptions, where company commitments to healthier eating appeared to have led to more promotions of fruit and vegetables, namely M&S and the Co-op. M&S had the most fruit and vegetables on promotion: 25 per cent, up slightly from 24 per cent in 2006. At the

Co-op, 16 per cent of price promotions were for fruit and vegetables, up from 12 per cent in 2006.

Sainsbury's improved slightly in the percentage of fruit and vegetables promotions: 15 per cent, up from 14 per cent. They were closely followed by Waitrose at 14 per cent – but this dropped from 25 per cent in 2006. A shockingly small eight per cent of Tesco's promotions were for fruit and vegetables: the lowest of any retailer, down from 19 per cent in 2006. Tesco is the largest retailer in the UK: its special offers will have a big impact on consumer purchasing. More promotions on fruit and vegetables would help Tesco's customers across the UK to achieve a healthier diet.

With this in mind, it is important to get the promotions right. The food consumers throw away each year is headline news, and about 1.4 million tonnes of this is fresh

fruit and vegetables that were not eaten in time⁹. We also urge retailers, as well as promoting fruit and vegetables, not to rely on multi-buys that may encourage high levels of food waste.

Multi-buys

A high percentage of promotions in the shops we surveyed were multi-buys (‘buy one get one free’, ‘3 for the price of 2’). In Sainsbury’s and Tesco 65 and 69 per cent of promotions respectively were multi-buy, and over 55 per cent of those multi-buy promotions were for fatty and sugary foods. Figures very similar to these are echoed by Morrisons and Waitrose.

With food prices going up, consumers are more than ever looking to benefit from the money-saving opportunities that multi-buy offers present. This is particularly important for lower-income consumers who are likely to be feeling the pinch more than most. However, we found that the dominance of fatty and sugary foods on promotion, coupled with a very high representation of multi-buys as a promotional technique, makes it more attractive for consumers to choose greater quantities of those foods that contribute to an unhealthy diet. Consumers are steered towards unhealthy products in order to benefit from special offers. Asda had the least multi-buys (30 per cent) as part of their promotions and the lowest percentage of these for fatty and sugary foods, though this was still 44 per cent, much higher than our target of seven per cent.

We found further promotional mechanisms in place, which had the effect of giving fatty and sugary food promotions increased dominance. We found that many of the premium sites in-store – ‘gondola ends’, where displays of products can achieve high sales results – were used to display fatty and sugary promotions. 65 per cent of these sites at Waitrose, and 62 per cent at Morrisons, displayed promotions for fatty and sugary foods.

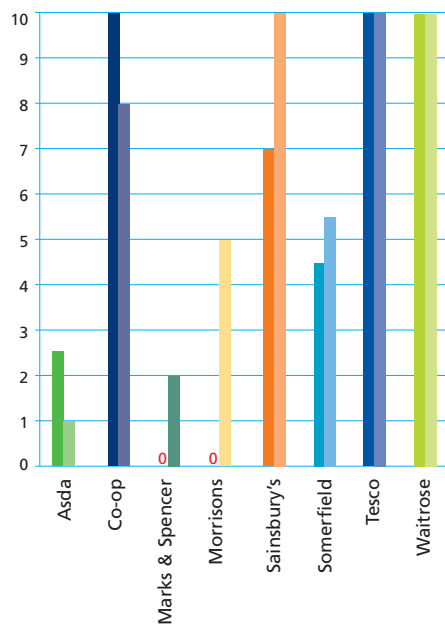
What the companies told us

Tesco has introduced a ‘fruit and veg pledge’ to run five half price offers on fruit and vegetables every week in 500 UK stores. It also runs 200 promotions on fresh produce, fish, wholefoods and ‘Healthy Living’ products every week.

Asda said its promotions are focused on lowering prices and not on providing multi-buy offers.

M&S told us that over the year, on average, 30 per cent of its promotions are for healthier food.

Snacks at the checkout



Retailers' scores out of ten for snacks at the checkout

Scores are rounded to the nearest 0.5

■ 2008 scores
■ 2006 scores

As in previous reports, we scored the number of checkouts that featured displays of sweets and unhealthy snacks such as crisps and soft drinks. We also scored retailers on whether they positioned such displays at child height, thus encouraging 'pester power'.

In 2006, Waitrose, Tesco and Sainsbury's shared joint first position. This year, only Waitrose and Tesco retained their top score of ten out of ten for this indicator. They were joined by the Co-op, which also was the only store to display exclusively healthier items at its checkouts.

Meanwhile, the scores for Sainsbury's, Morrisons and M&S slid lower than last year, with Sainsbury's managing a score of only seven out of ten, and Morrisons failing to score any points. In Sainsbury's, a third of the checkouts in the surveyed store displayed less healthy foods, and all of these checkouts had some fatty and sugary products at child height. Many of these products

were chocolates and chocolate eggs because our survey took place just before Easter. However, we also found crisps at some of the checkouts. All checkouts in Morrisons had fatty and sugary confectionery, drinks and crisps, and all of the checkouts displayed some products at child height.

M&S also scored zero for continuing to display a wide range of sweets and snacks at every checkout – many of them at child height, with cartoons on the packet. Although there were some healthier products such as dried fruit and nuts, these were largely overwhelmed by the sweets and unhealthy snacks. Asda once again scored a low 2.5 out of ten for having only a quarter of its checkouts snack-free: 25 out of 33 checkouts displayed confectionery and soft drinks, and all of them had child-height displays.

What the companies told us

Sainsbury's told us it has a policy of not having confectionery on its main store checkouts, with exceptions at Easter and Christmas.

M&S has a policy of having at least one confectionery-free till in every store, but this was not the case in the store we visited. It says it is currently trialling removing sweets from checkouts in a control group of stores.

The **Co-op** has a policy that prohibits the display of child targeted products that are high in fat, sugar or salt at free-standing checkouts. It will also now extend this to all checkouts, including kiosks, by the end of 2009.

4 Customer information and advice

Indicator: promotion and provision of healthy eating information and advice in-store, on websites and on national telephone helplines.

Target: good availability of accurate information and advice.

As in previous years, we looked at a wide range of customer information and advice. Our surveyors looked at promotion and provision of healthy eating information and advice in the stores and on websites. An 'anonymous shopper' also called each of the supermarket's help-lines to ask a series of questions about nutrition and health, quizzing the supermarkets on issues such as their nutrition labelling schemes and five-a-day messages.

As in 2006, we found that the amount and quality of information available, in different formats, varied a great deal among our surveyed retailers. There has been improvement since our last report: some retailers scored over half of the marks, but our survey showed that there is still much more than can be done.

Surveyor's question:

'I saw a sign saying 'Eat five-a-day'. It was in the fruit and vegetable section. What does it mean?'

Somerfield

'Five-a-day? That's just your recommended dose of fruit I expect or something. It's a government thing, isn't it?'

Waitrose

'Bear with me...I'm not aware of this. It's not a question we ever really get.'

Surveyor's questions:

'Can you tell me how I can find out which of the ready meals are healthier?'

Tesco

'It gives you all the information on the packaging; we don't know what is best for you. We can't give you specific information.'

Asda

'They ('Extra Special' range) would be better quality, a bit more special. You'll get more nutrients, better value for money.'

Surveyor's question:

'The fat label says 29.7g and 42 per cent. Is that healthy? Is that unhealthy?'

Tesco

'I don't know, it depends on what you want to eat. I could eat endless fat if I want because I don't put on weight...it depends what shape you want.'

Somerfield

'The government recommends that you get 100 per cent, so with the fat you've got 42 per cent in the meal and that leaves you with 58 per cent.'

Morrisons

'It depends on what diet you eat, if it's good or bad.'

Asked about the colour scheme on the GDA front-of-pack labelling:

Tesco

'I believe we operate a traffic light system so if the fat is on a green background, it means it's good.'

(Surveyor then asks about the calories being on a blue background:)

'Okay, I checked with a colleague and it doesn't actually mean anything. It's just colour-coding.'

Overall, Sainsbury's came top for customer information, scoring 14 points out of a possible 20. It was closely followed by M&S and the Co-op, with 13 and 12.5 respectively. No other supermarket scored more than half of the total score. No supermarket scored well for in-store leaflets and magazines with information on healthy eating.

However, the helpline survey showed improvements: the Co-op scored full marks, giving excellent and accurate advice. Sainsbury's came a close second, giving full explanations for the questions, with some useful tips. All the other retailers scored half marks or less for this indicator: they gave incomplete or inaccurate advice, or no information at all. The inability of Tesco's, Somerfield's and Morrisons' helplines to offer accurate advice about GDAs was disappointing, and

may reflect the potential confusion caused by non-colour-coded percentage figures. All the retailers with a traffic-light colour-coded element to their front-of-pack labelling answered correctly that green was the healthiest (low), orange was all right in moderation (medium) and red was something to eat only occasionally (high).

Promotion of healthy eating messages in-store varied widely. The Co-op and M&S scored very well on promoting the five-a-day message throughout the stores we surveyed, but in Asda and Morrisons there was a lack of eye-catching five-a-day messages: most signs and promotions were for price cuts, low prices, or multi-buys on fatty and sugary foods. M&S and Morrisons also had no in-store magazines left when our surveyor visited the store. At the entrance to the Asda store

there was an 'example' trolley demonstrating their everyday low prices, which unfortunately contained no fruit or vegetables.

Sainsbury's scored the most points for information on their website, where they offered lots of 'advice and ideas for a healthier lifestyle' – including a 'Living Healthily' quiz and information on five-a-day. M&S and Tesco also provided good, clear information on a range of healthy eating issues such as fat, salt and sugar; Tesco provided a 'Lunchbox Tool' to help customers design healthy lunchboxes for themselves and their families. The Co-op, Morrisons and Somerfield had little consumer-facing information on their sites; we feel they could be doing more to provide clear guidance for consumers.

What the companies told us

Asda's website offers information on healthy living, active lifestyles and suggestions on how to achieve five-a-day. The in-store magazine features at least two pages on health.

The **Co-op's** customer relations staff are trained on the Healthy Living range and signpost labelling. In-store radio and till screens help to promote the five-a-day message.

M&S has a magazine that includes many 'Eat Well' products and runs a regular feature called 'Health Notebook', including advice on health issues. 1,500 healthy eating assistants have been trained and are in-store to help colleagues as well as customers.

Morrisons' 'Let's Eat Smart' website and customer magazine provide information on healthy eating, including recipes, features, tips and advice from a resident nutritionist.

Sainsbury's website offers healthy eating advice, guidance on labelling, recipes and 'Try' tips. Its website has been independently audited by the British Nutrition Foundation (BNF), and its customer helpline receives training from the nutrition team.

Somerfield says all the recipes in its magazine feature full GDA labelling, five-a-day count and tips for a healthy balanced diet. Applying GDA information has enabled better management of the key nutrient content of every recipe.

Tesco's new health website was launched in 2007, with meal plans, healthy recipes and click to buy ingredients. It also has an 'Ask an expert' section and interactive tools to encourage healthy eating.

Waitrose has fact sheets on food issues available to customers on request at welcome desks. In-store training to raise staff awareness on health and nutrition issues will roll out in 2009.





The diet and health challenge

Almost two-thirds of adults and a third of children are either overweight or obese¹⁰. Work by the Government Office for Science's Foresight¹¹ programme suggests that, without clear action, figures for obesity will rise to almost 60 per cent of men, 50 per cent of women, and a quarter of all children. Obesity reduces a person's life expectancy by nine years, on average, and increases the risk of a wide variety of diseases – including cardiovascular disease, diabetes, and arthritis. The economic cost to the nation of overweight and obesity is estimated at up to £7.4 billion per year¹².

Diet and physical exercise are both important factors in this. Snacks, sweetened fizzy drinks, and calorie-rich food, together with larger portions of fast food and snacks, have all contributed to this problem – as have lower levels of physical activity¹³. In addition, eating too much salt can lead to higher blood pressure, which increases the risk of coronary heart disease or stroke¹⁴. Seventy-five per cent of the salt in our diets comes from processed foods; if people eat more processed foods they are probably also eating more salt. Current estimates suggest that the average person consumes 9g of salt a day. This is 3g over the maximum recommended by the Scientific Advisory Committee on Nutrition (SACN).

Supermarkets have an enormous impact on the nation's health, for good or ill, through the shopping choices they encourage their customers to make: they account for 72 per cent of grocery sales¹⁵. Tesco, Asda, Sainsbury's and Morrisons account for 75 per cent of the market spend¹⁶.

Although this report shows that retailers are improving in some areas, such as front-of-pack labelling and using less salt, the widespread promotion of fatty and sugary foods undermines this good work. As consumers feel the pinch of rising food and fuel prices and the impact of the credit crunch, price reductions are increasingly important, particularly for people on a tight budget in their weekly food shop¹⁷. Supermarkets must not steer consumers, eager to benefit from price reductions in-store, towards unhealthy foods.

We want supermarkets to implement policies that will ensure that 30 per cent of price promotions are for fruit and vegetables, and we want them to run fewer multi-buy promotions on fatty and sugary foods. The figures we outlined on the growing problem of obesity in the UK are stark: supermarkets must not dilute the efforts they have made so far in making healthy choices easier for consumers.

Our recommendations to retailers

- ▶ As policy, ensure that at least 30 per cent of price promotions are for fruit and vegetables, and reduce the number of multi-buy promotions on fatty and sugary foods.
- ▶ Remove all unhealthy snacks and sweets from checkouts.
- ▶ Move faster in reducing salt, fat, saturated fat and sugar in own-brand products and meet the FSA salt reduction targets for all products by 2009.
- ▶ Roll out front-of-pack, colour-coded signpost labelling to help shoppers improve the balance of their diets. Take on board findings from expected FSA research evaluating front-of-pack schemes (2009) to bring labelling in line with best practice.
- ▶ Give Guideline Daily Amounts per 100g and per serving on all product packaging.
- ▶ Improve information on nutrition and health messages on websites and train all staff on customer help-lines to answer questions on these topics. Promote these as sources of healthy eating information.
- ▶ Improve promotion of healthy eating messages in-store, from leaflets and magazines to shelves, signs and posters.
- ▶ Build our four health indicators into corporate responsibility target-setting and reporting at Board level.

Corporate responsibility

Sainsbury's, as in 2006, has Key Performance Indicators (KPIs) that incorporate our recommendations – these are company targets that staff can be measured against and on which the company can report to their shareholders and the public.

The Co-op has also taken on our health recommendations and incorporated them into its KPIs.

M&S has developed its 'Plan A', which incorporates our recommendations on nutritional content, labelling and customer information and advice. These retailers have shown a real commitment to more responsible retailing and making their customers' health a priority, although more work needs to be done across the sector to curb unhealthy food promotion. We urge other retailers to follow suit.

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