SUMMARY OF SUPERLIST HEALTH 2020

Not all Dutch supermarkets make it easy to choose the healthy option

All Dutch supermarkets have expressed the intention to make it easier to choose the healthier option. Lidl, Dirk, Coop and Ekoplaza, have most successfully translated this intention into policy and practice. But not a single supermarket has set adequate targets for the sales of healthy products that cover their entire product range. Four out of five of their flyer promotions are unhealthy. Nevertheless, almost every supermarket in this survey is leading in at least one area that can inspire other supermarkets.

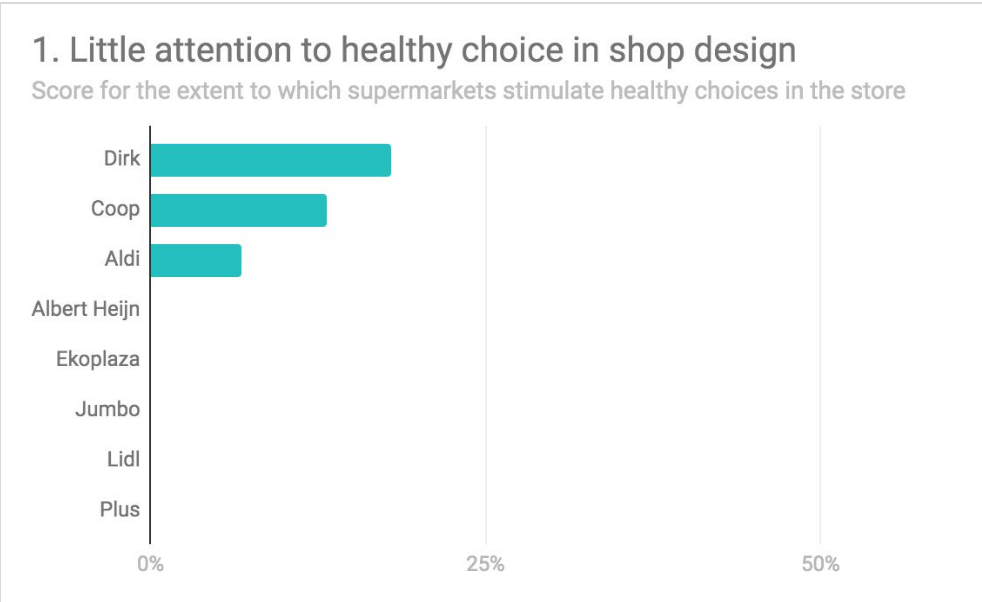
About 70 percent of our daily food comes from the supermarket. Supermarkets therefore have a huge impact on what we eat. In the past few years, supermarkets have jointly pledged to make healthy food the easier choice, as part of the Dutch National Prevention Agreement.

Superlist Health is a biennial recurring comparison of Dutch supermarkets, which reveals what supermarkets are doing to help their customers choose the healthy and sustainable option. In this first edition we focus on the theme of Health. The main question in this research is: to what extent do supermarkets, as an environment for daily food choices, stimulate a healthy dietary pattern?

To understand this better, Questionmark prepared a research methodology in collaboration with the Dutch Diabetes Foundation, the Dutch Heart Foundation, the Dutch Liver and intestinal diseases foundation and the Dutch Kidney Foundation under the supervision of a Scientific Advisory. Prior to initiating the research, supermarkets were given the opportunity to comment on the methodology. In June 2020 the definitive version of the methodology was published and the research period began, which continued until August 19 2020. The research method focussed on the objectives that the supermarkets set for themselves for health, the share of healthy products on offer, the share of healthy products promoted, and the extent to which they made the healthy choice easy to find on the shopfloor. The picture that emerged from the research can be summarized in four main findings.

1. Shop design pays little attention to healthy choice

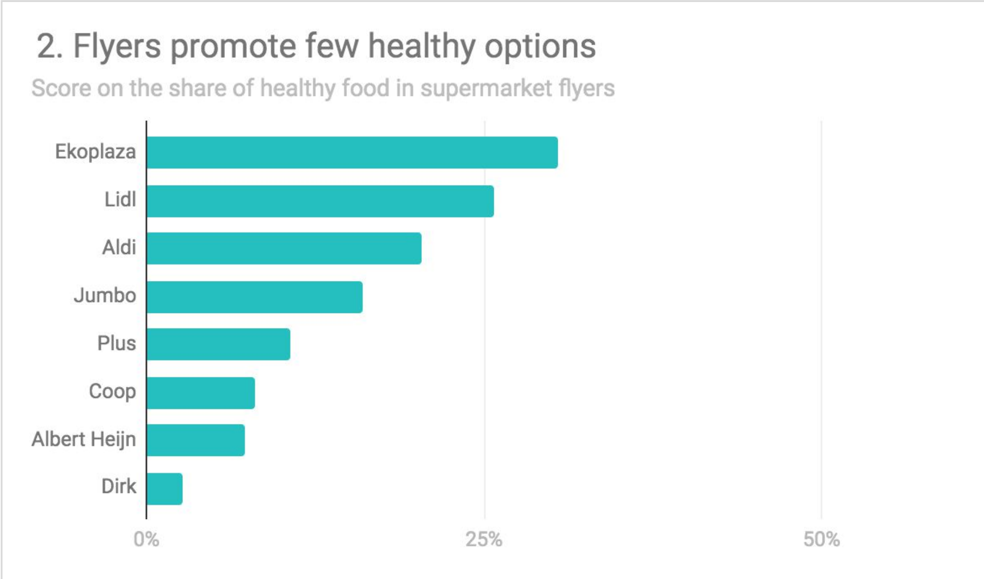
Almost every supermarket has expressed the intention to stimulate healthy food on the shopfloor or at least discourage unhealthy choices. The description of the policy is often too broad to be interpreted clearly. Areas with significant impact on health, such as marketing unhealthy products to children, are not being addressed sufficiently.
Dirk is the only supermarket that does not tempt customers with unhealthy impulse purchases at the checkout. Coop is the only supermarket consistently offering healthy recipes as inspiration for customers in the shop. Aldi is the only supermarket consistently marketing healthy products to children.
We did note that several supermarkets have nutrient guides on their shelves: brightly coloured signs that indicate which products are relatively healthy or unhealthy in terms of their nutritional value. Dirk is however the only supermarket where this measure is implemented consistently.



2. Flyers promote few healthy options

The promotion flyer can be a powerful means to help people eat a more healthy diet. In practice, unhealthy products predominate in all promotion flyers. On average, 82 percent of promotions advertised in folders are unhealthy. In this survey just one flyer contained more than 40 percent of products that meet the Dutch nutrition standards[1], and it was from Lidl. ISub-categories show greater differences. While advertising for sugar-filled drinks for children and alcohol is still the norm in many supermarkets, Ekoplaza occasionally issues 'alcohol-free' flyers and Lidl does not have special offers on sugar-filled drinks in small cartons that are typically given to children.

[1] Refers to the *Schijf van Vijf*, the official Dutch guidelines for healthy food and consumption.



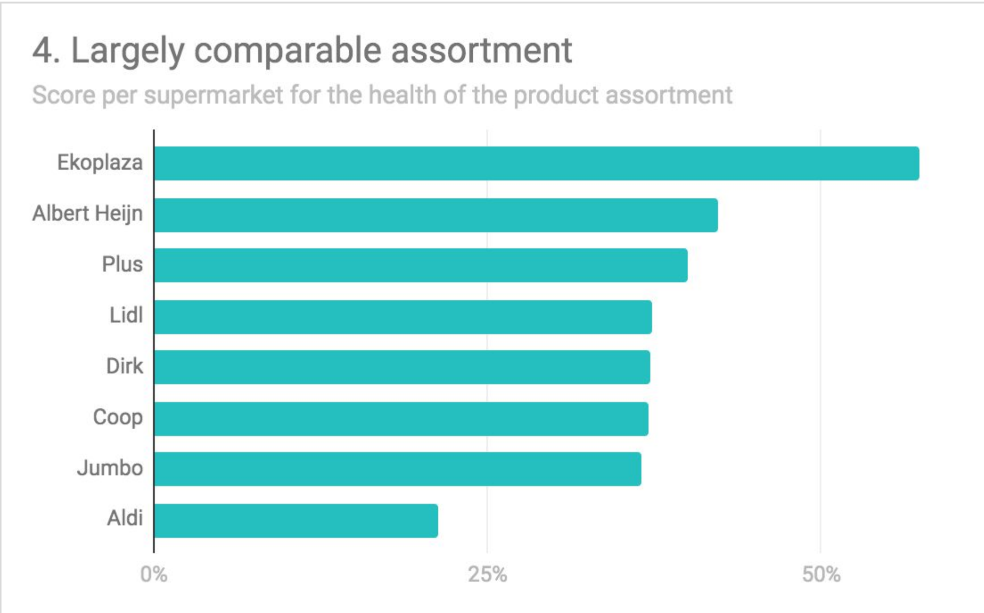
3. No adequate sales targets for healthy food

Supermarkets do not provide much insight into the extent to which they are working to meet the pledges in the Prevention Agreement. Currently, none of the supermarkets has adequate sales targets for healthy products. Existing objectives and reports on these objectives are not easy to interpret because they are restricted to the supermarket's own brands. From the supermarkets' perspective, the distinction between own brand and A-brand is logical, but it is irrelevant for the health of their customers. The agreements in the Dutch National Prevention Agreement about increasing sale of products that meet the Dutch National nutrition standards do not distinguish between A-brands and own brands. A number of supermarkets are taking steps to report about the entire range in the future, to provide more insight into the effort being made to fulfil the agreements in the Dutch National Prevention Agreement.

4. Largely comparable assortment

The share of healthy products in the supermarkets' assortment is similar across supermarkets. Even if we exclude inherently unhealthy product groups like candy, chocolate and crisps, on average 59 percent of the remaining product range does not meet the Dutch National nutrition standards.

A striking aspect is the similarities between supermarkets: in some product groups, regardless of the supermarket, there are hardly any healthy varieties available. For example, dry bread products (biscuits, crackers) generally contain too little fibre to meet the Dutch National nutrition standards. More than 4 out of 5 meat and meat substitute products also fall outside the Dutch National nutrition standards, generally because they contain too much salt. In terms of the quantity of sugar in soft drinks and salt in meat (substitutes) and sauces, differences are evident. Aldi sells relatively high amounts of salt and sugar in those product groups, while the Ekoplaza assortment is distinguished by relatively low-sugar soft drinks and relatively low-salt meat and meat substitutes.

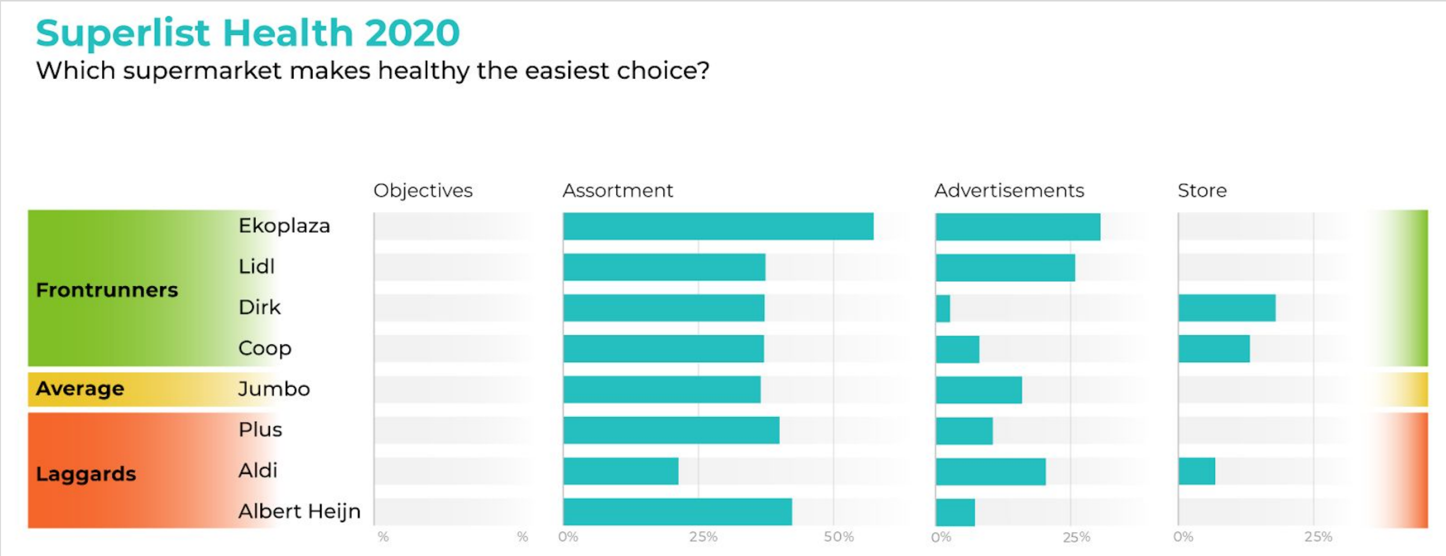


Ranking

Using these findings, a ranking of supermarkets was prepared based on a weighting as described in Superlist Health methodology published in June 2020. The ranking shows which supermarkets generally belong to the frontrunners, laggards or those in the middle. The boundaries between the groups are drawn where the differences between two supermarkets are the largest. But it was determined in advance that the frontrunner and laggard groups would always contain more than one supermarket.

The actual distance between the three 'laggards' in the ranking is minimal. Although Albert Heijn, Aldi and Plus performed differently in various sub-categories, their place in the final ranking is similar.

This ranking must not be considered an absolute judgement. In contrast, it is striking that it is not always the same supermarket that is ahead in all areas. The differences show that all of the supermarkets could improve their performance by learning from the good examples of their fellow supermarkets.



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This document is a summary of research report Superlist Health 2020, as published by Questionmark on october 13, 2020. The full report (in Dutch) with backgrounds, figures and details is available on www.superlijst.nl.