rating retailers for health

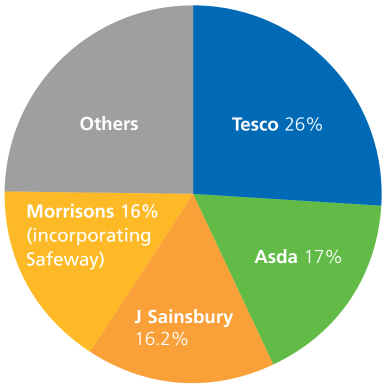
how supermarkets can affect your chances of a healthy diet

by Sue Dibb

NCC National Consumer Council

Making all consumers matter

Rating retailers for health Summary



Supermarkets' share of the UK food market 2003

www.guardian.co.uk

The government's white paper on public health[1] puts addressing obesity and poor diets high on the political agenda. The solutions lie in broad-ranging action on diet and physical exercise. Everyone has a responsibility and a role to play.

Retailers are an important part of this picture. Supermarkets have unprecedented influence in the marketplace, and their growth in recent decades has transformed the way we shop, cook and eat. As a nation, we now spend three-quarters of our national food bill of over £100 billion in just four food retailers – Tesco, Asda, Sainsbury's and Morrisons (now incorporating Safeway)[2]. The products retailers have developed and stock, and the ways in which we are encouraged to purchase them, have introduced us to a greater choice and variety of tastes than ever before. Retailers are already demonstrating their commitments to healthier eating[3]. But how can we measure progress, and what more could retailers do to help all customers make healthier choices easier choices?

To facilitate this, the National Consumer Council (NCC) has developed a Health Responsibility Index based on a series of consumer-focused Health Indicators to measure the UK's ten largest food retailers' practices in four key areas (see opposite).

The findings from our spot-check survey of major stores around England during June 2004 measure and compare company performance, highlight good practice and identify ways in which retailers can do more to support nutrition and public health targets.

[1] Choosing Health, making healthy choices easier, 2004

[2] www.guardian.co.uk

[3] British Retail Consortium, Eat Well, Drink Well: retail initiatives towards healthier eating, 2003

The NCC's Health Indicators

1. Nutritional content

- Sodium (salt) content of ten everyday own-label processed foods

2. Labelling information

- Nutrition information provided on food labels: declaration of 'full 8' nutrients (energy, protein, carbohydrate, sugars, fat, saturated fat, sodium, fibre) and translation of sodium content into salt. (Sodium is a constituent of salt. Determining the salt content per serving requires multiplying the sodium level by 2.5 and then by the serving or portion size.)
- Use of Guideline Daily Amounts (GDAs) on nutritional labelling. (GDAs provide a guide to assist consumers understand to what extent the amount of a given nutrient in a food contributes towards a 'healthy' daily intake.)
- Use of interpretative 'high/medium/low' or 'traffic light' nutrition labelling.

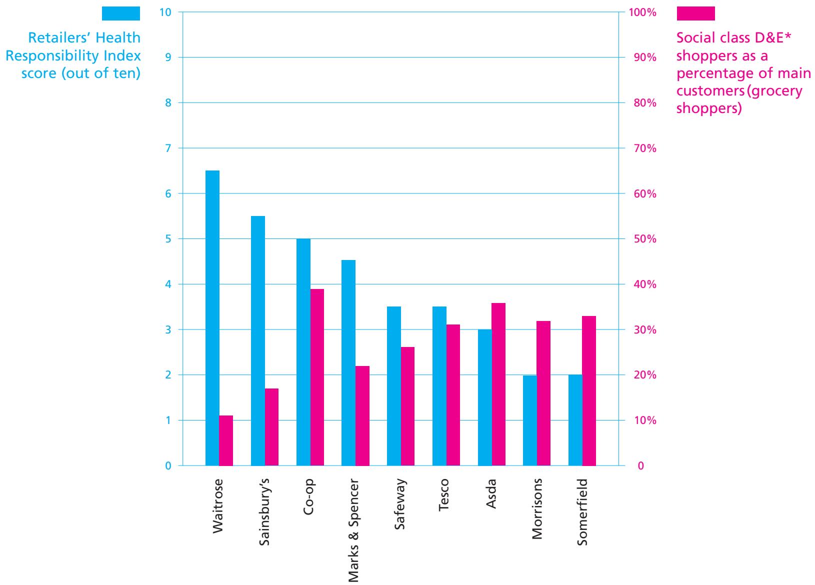
3. In-store promotions

- Shelf space devoted to 'healthy' snack foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery).
- Presence of sweets and 'less healthy' snacks at the checkout.

4. Customer information and advice

- Information and advice on healthy eating available in-store.

Key findings



Retailers' NCC Health Responsibility Index score and demographic profile of core customers

We did not rate Iceland overall, but it is worth noting that half the company's main shoppers are from social class D&E.

Demographic information: Verdict Research, How Britain Shops, 2004

*lower working class and lowest level of subsistence

- Supermarkets have a considerable role to play in helping improve the health of the nation through their policies and practices. Yet, while we found examples of good practice, no retailer scored well in all four key areas that we investigated.

- Our findings show that consumers' choice of supermarket can affect their chances of eating a healthy diet.

- All retailers – even those that scored highest on our Health Responsibility Index – have significant room for improvement in fulfilling their responsibilities to help customers eat more healthily.

- Overall, more 'up-market' supermarkets gained a higher Health Responsibility Index rating while those with a greater proportion of lower-income shoppers scored less well. The Co-op remained an exception – rating more highly than its customer demographic profile would predict. We surmise that retailers' practices are contributing to or exacerbating the inequalities that exist between the diet and health of more affluent and less affluent consumers.

- All companies except Morrisons (now including Safeway) provided us with details of relevant company policies. Some are aspirational while others would be strengthened by communicating clearer targets and timescales. In a few cases we found discrepancies between companies' stated existing policies and what we found in practice.

- Our findings suggest that most retailers are ahead of many leading branded food manufacturers on reducing excess salt and providing more helpful nutrition labelling. For salt, in virtually all product categories we surveyed, the majority of the retailers' products compared favourably with leading brands.

The Health Responsibility Index score is calculated by giving equal weighting to each of the four key areas we investigated, averaging the scores from these key areas and rounding to the nearest 0.5.

How do the retailers score?

We provide individual 'report cards' for each retailer. These are shown in the following pages in the order in which supermarkets have been ranked.

In summary:

Waitrose was rated number one, setting the pace for the rest of the field.

But, with 6.5 out of ten, there is still room for improvement. It scored top marks and was the overall winner for removing sweets at the checkout, and scored best on its in-store information and advice. However, it needs to make more progress on salt reduction and nutrition labelling.

In at number two – Sainsbury's.

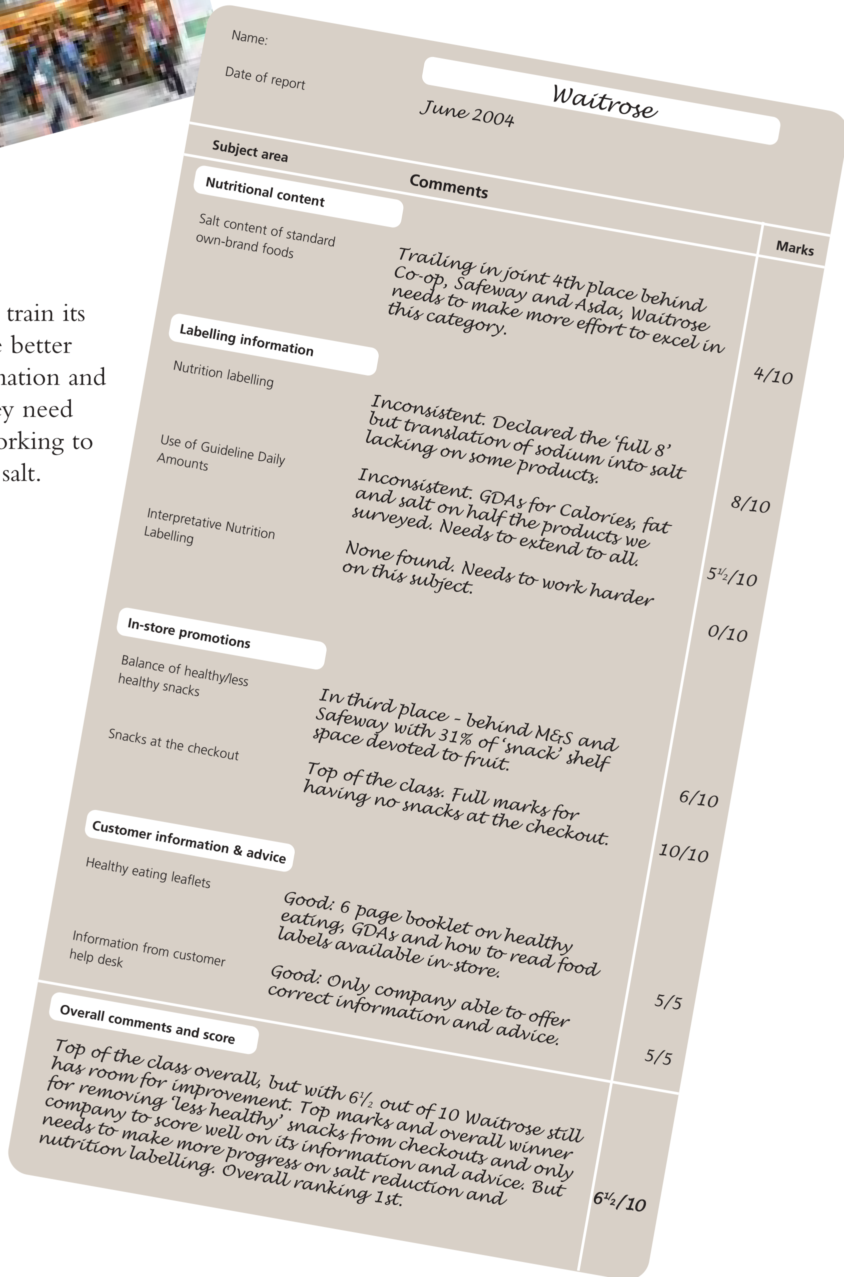
Struggling to keep up with the 'big guys' in terms of sales, Sainsbury's scores relatively highly on removing snacks off the checkout and for its information and advice, but it is not a pace-setter in other respects. Middle-ranking for salt reductions and, as with all companies, there is room to make more progress towards achieving Food Standards Agency (FSA) targets.

In third place, the Co-op.

Co-op rates tops for its nutrition labelling practices and is also top scorer on removing excess salt from processed foods. It falls down on information and advice and the balance of healthy to 'less healthy' snacks in-store.

In fourth place, Marks and Spencer (M&S).

M&S is the top scorer for its shelf space devoted to fruit compared with 'less healthy' snacks. There are still too many 'less healthy' choices at the checkout. Along with virtually all companies, M&S needs to train its staff to provide better in-store information and advice, and they need to continue working to remove excess salt.



Name: Waitrose
Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	Trailing in joint 4th place behind Co-op, Safeway and Asda, Waitrose needs to make more effort to excel in this category.	4/10
Labelling information		
Nutrition labelling	Inconsistent. Declared the 'full 8' but translation of sodium into salt lacking on some products.	8/10
Use of Guideline Daily Amounts	Inconsistent. GDAs for Calories, fat and salt on half the products we surveyed. Needs to extend to all.	5½/10
Interpretative Nutrition Labelling	None found. Needs to work harder on this subject.	0/10
In-store promotions		
Balance of healthy/less healthy snacks	In third place - behind M&S and Safeway with 31% of 'snack' shelf space devoted to fruit.	6/10
Snacks at the checkout	Top of the class. Full marks for having no snacks at the checkout.	10/10
Customer information & advice		
Healthy eating leaflets	Good: 6 page booklet on healthy eating, GDAs and how to read food labels available in-store.	5/5
Information from customer help desk	Good: Only company able to offer correct information and advice.	5/5
Overall comments and score	Top of the class overall, but with 6½ out of 10 Waitrose still has room for improvement. Top marks and overall winner for removing 'less healthy' snacks from checkouts and only company to score well on its information and advice. But needs to make more progress on salt reduction and nutrition labelling. Overall ranking 1st.	6½/10

At equal fifth place, Safeway and Tesco occupy the middle ground with Asda seventh.

In most respects, Safeway scores higher than its take-over company, Morrisons, raising questions over whose standards will prevail in future. It was only pipped by M&S for its fruit displays relative to 'less healthy' foods.

UK's largest retailer Tesco – only makes it into equal fifth place. It does not shine in any indicator category and needs to work on its nutrition information and advice as well as nutrition labelling.

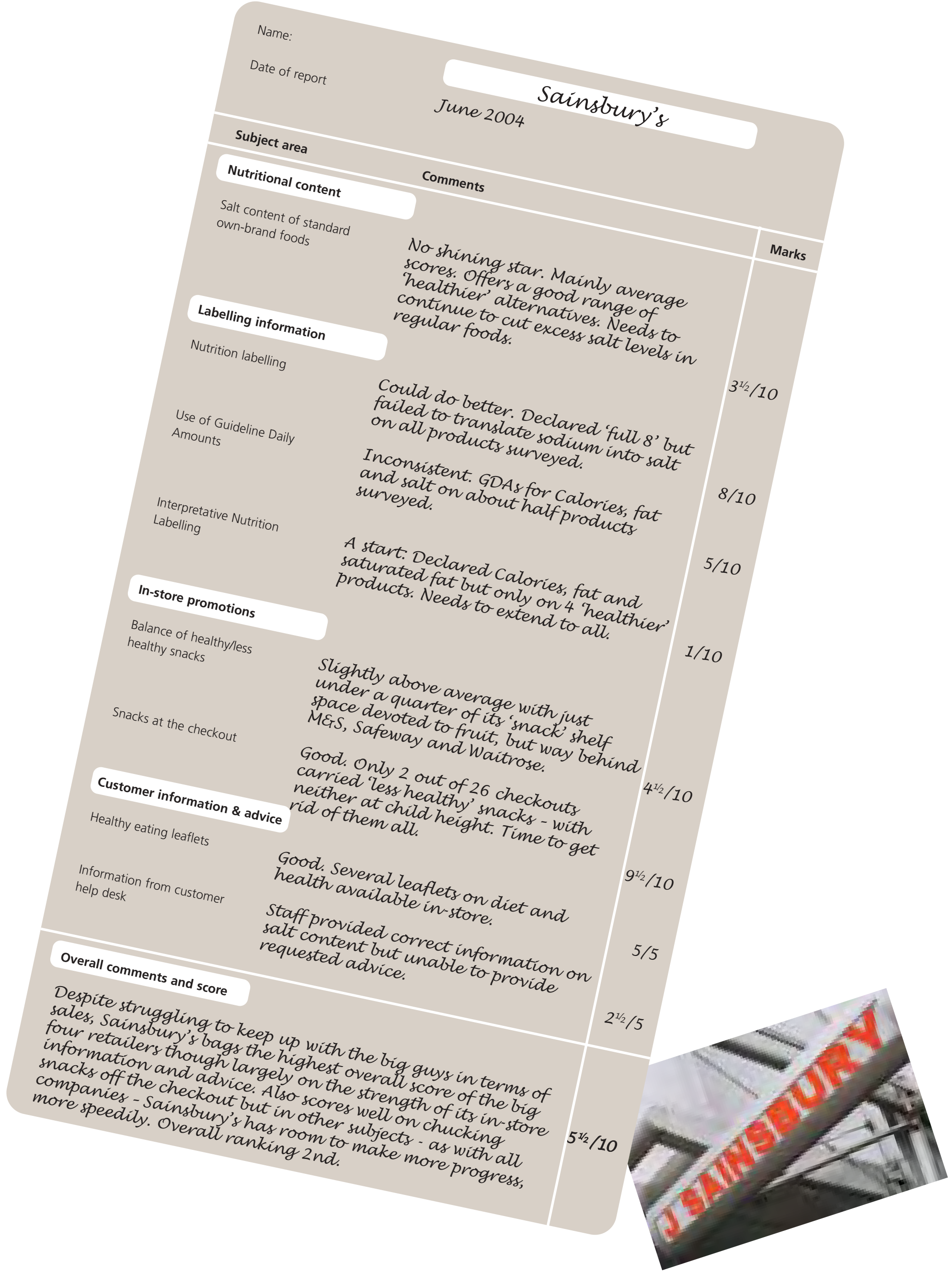
Asda – now the UK's second-largest supermarket chain, and part of the US Walmart empire – needs to flex its muscle more to help its customers fight the flab and eat more healthily. It needs to work on all aspects, particularly the nutritional balance of its in-store promotions and eliminating snacks at the checkout.

Somerfield and Morrisons – are struggling to keep up. They need to make more effort.

Not a rising star, Somerfield needs to go that extra mile on reducing salt, improving labelling and the information and advice it offers.

With the highest salt content of all companies and low scores on labelling we'd like to see Morrisons using some of Safeway's expertise to turn this now third-largest retailer into a top player for health.

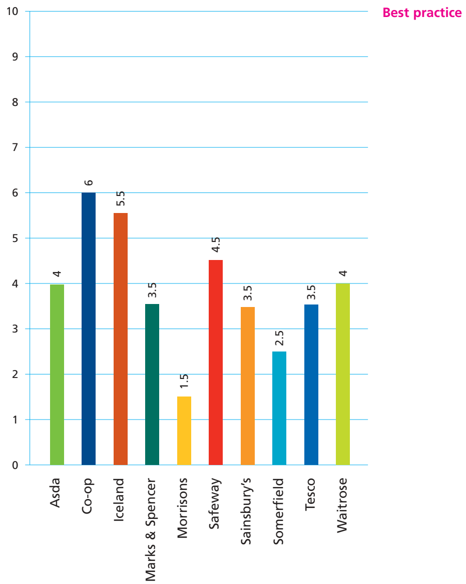
Iceland – we decided not to give an overall score for this predominantly frozen-food retailer as stores only sell limited fresh fruit and vegetables. However, many people on low incomes use the store, so policies and practices will affect their diets.


Name: Sainsbury's

Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	No shining star. Mainly average scores. Offers a good range of 'healthier' alternatives. Needs to continue to cut excess salt levels in regular foods.	3½/10
Labelling information		
Nutrition labelling	Could do better. Declared 'full 8' but failed to translate sodium into salt on all products surveyed.	8/10
Use of Guideline Daily Amounts	Inconsistent. GDAs for Calories, fat and salt on about half products surveyed.	5/10
Interpretative Nutrition Labelling	A start: Declared Calories, fat and saturated fat but only on 4 'healthier' products. Needs to extend to all.	1/10
In-store promotions		
Balance of healthy/less healthy snacks	Slightly above average with just under a quarter of its 'snack' shelf space devoted to fruit, but way behind M&S, Safeway and Waitrose.	4½/10
Snacks at the checkout	Good. Only 2 out of 26 checkouts carried 'less healthy' snacks - with neither at child height. Time to get rid of them all.	9½/10
Customer information & advice		
Healthy eating leaflets	Good. Several leaflets on diet and health available in-store.	5/5
Information from customer help desk	Staff provided correct information on salt content but unable to provide requested advice.	2½/5
Overall comments and score	Despite struggling to keep up with the big guys in terms of sales, Sainsbury's bags the highest overall score of the big four retailers though largely on the strength of its in-store information and advice. Also scores well on chucking snacks off the checkout but in other subjects - as with all companies - Sainsbury's has room to make more progress, more speedily. Overall ranking 2nd.	5½/10

Summary findings for each of our four key areas



Retailers' scores out of ten for the sodium content of a sample of 'standard' own-label products

Note: Scores have been rounded to nearest 0.5

1. Nutritional content

Salt

For each retailer we recorded the levels of sodium (salt) declared in on-pack nutrition information panels of the following ten own-label 'standard' and 'healthier' equivalent foods. We then compared these sodium levels against FSA salt model 'target average' levels.

- Baked beans
- Canned tomato soup
- Cheese and tomato pizza
- Cornflakes
- Pork sausages
- Salt and vinegar crisps
- Sunflower/vegetable fat spread
- Tomato ketchup
- Tomato pasta sauce
- White sliced bread.

We found:

- There are considerable variations between the retailers in the salt profile of their own-label 'standard' products. We calculate that where you shop could add up to as much as 25 per cent more salt in your diet.
- Out of over 100 'standard' product that we surveyed, only two met FSA targets for sodium. Only just over a third (37 per cent) of 62 'healthier' products met the targets.
- No retailer scored highly overall. Clearly all have considerable work to do to achieve FSA targets.
- Applying our Health Indicator, the Co-op scored highest (six out of ten) for removing excess salt with Morrisons at the bottom with the saltiest products scoring only 1.5 out of ten.
- There is some evidence that most retailers are ahead of many leading brand manufacturers in reducing salt from everyday 'standard' foods.
- Supermarket 'healthier' own-label foods generally – but not always – contain less salt than their own-label 'standard' products.

Fat, saturated fat and sugar

Lack of FSA food category 'targets' for fat, saturated fat and sugar hampered development of Health Indicators and we have not rated retailers for these nutrients. However, from our exploratory comparisons of fat and saturated fat (in sausages, pizza and crisps) and sugar content (in ketchup, yogurt and frosted cereal) we make a number of observations:

Fat and saturated fat

- As with sodium levels, we found variations in the fat and saturated fat content of products offered by different retailers – particularly for sausages and pizza, though less so for crisps.
- In general the 'healthier' options we found offered significantly reduced fat and saturated fat content – cutting both by at least 50 per cent or more in most cases.

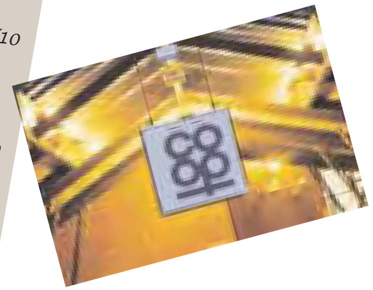
Sugar

- All our ketchup, yogurt and frosted cereal samples rated as 'high' sugar products.
- We found some variations in the sugar content of products offered by different retailers – particularly for tomato ketchup and to some degree for yogurt, though not for frosted cereal. All frosted cereals contained about the same amount of sugar – 38g/100g – meaning that over a third of these breakfast cereals are sugar.
- In general the 'healthier' ketchups and some – but not all – yogurts offered reduced sugar content.

Name: Co-op

Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	Top of the class for removing excess salt - but still some way to go for best marks.	6/10
Labelling information		
Nutrition labelling	Good. Co-op gives 'full 8' information on all products and first retailer to translate sodium into salt.	10/10
Use of Guideline Daily Amounts	Could do better. GDAs found on only some products.	3/10
Interpretative Nutrition Labelling	Taking a lead. Only company to declare 'high', 'medium' or 'low' on nutrition panels and only company to provide front of pack information on Calories, fat and salt on all products we surveyed. Keep up the good work!	9/10
In-store promotions		
Balance of healthy/less healthy snacks	Falls down badly in this subject - only Iceland scored lower. Needs to give less shelf space to 'less healthy' snacks.	3/10
Snacks at the checkout	Doing better than most - with only 2 out of 13 checkouts - both at child height. Could go the extra mile to chuck 'less healthy' snacks off all checkouts.	8½/10
Customer information & advice		
Healthy eating leaflets	Like the majority of class-mates the Co-op had no healthy-eating leaflets in-store.	0/5
Information from customer help desk	Unhelpful - staff were too busy selling National Lottery tickets to help.	0/5
Overall comments and score	The Co-op rates tops for its nutrition labelling practices and is also top scorer on removing excess salt from processed foods. But falls down on information and advice and the balance of healthy/'less healthy' snacks in-store giving overall ranking of 3rd.	5/10



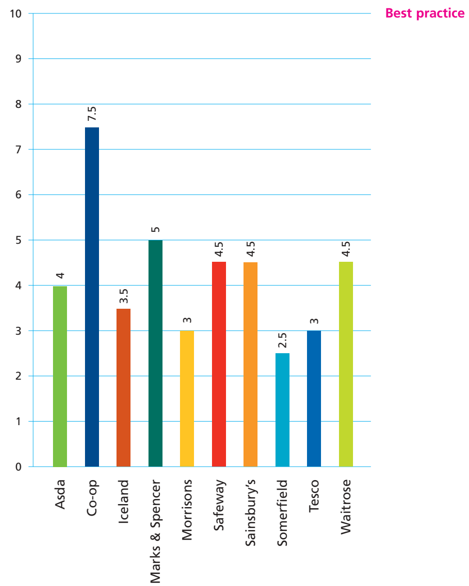
2. Labelling information

Applying our three labelling information Health Indicators (nutrition information, use of GDAs and interpretative nutrition labelling) to the products we surveyed we found:

- All retailers declare the ‘full 8’ nutrients (see page 1) in nutrition labelling for virtually all products we surveyed, but in other respects there is little consistency in nutrition labelling practices between the retailers, and even between products from the same retailer.

- The Co-op stands out in this category for the lead that it has taken in respect of labelling information, particularly on interpretative information.

- Only Asda, Co-op, M&S and Iceland consistently translate sodium information into salt.



Retailers’ scores for labelling information

Note: Scores have been rounded to nearest 0.5

Name: *Marks & Spencer*

Date of report *June 2004*

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	*Must make more effort. Poor score for removing excess salt. M&S tomato pasta sauce was the saltiest we found with over 3 times the FSA target.*	3½/10
Labelling information		
Nutrition labelling	*Good. Provides full 8 information and consistently translated sodium into salt on all products surveyed.*	10/10
Use of Guideline Daily Amounts	*Good start. Provided GDAs for Calories, fat and salt on just over half products we surveyed. Needs to extend to all products.*	5½/10
Interpretative Nutrition Labelling	*None provided. M&S needs to do more homework on this subject.*	0/10
In-store promotions		
Balance of healthy/less healthy snacks	*Well done. Top of the class for its fruit displays relative to ‘less healthy’ snacks.*	9/10
Snacks at the checkout	*Poor. Nearly bottom of the class (only Asda scored less) for checkouts with ‘less healthy’ snacks - all at child height - encouraging pester-power.*	1½/10
Customer information & advice		
Healthy eating leaflets	*Good work. ‘Eat well, feel great’ leaflets on diet and health available*	5/5
Information from customer help desk	*Unhelpful. Staff unable to provide information and advice.*	0/5
Overall comments and score	*M&S is top of the class for its fruit relative to ‘less healthy’ snacks and provides good leaflets but needs to be more consistent across all classes. Still too many ‘less healthy’ snacks at the checkout and excess salt in processed foods and needs to train staff to provide better in-store information and advice. Overall rating 4th.*	4½/10

Name: Safeway

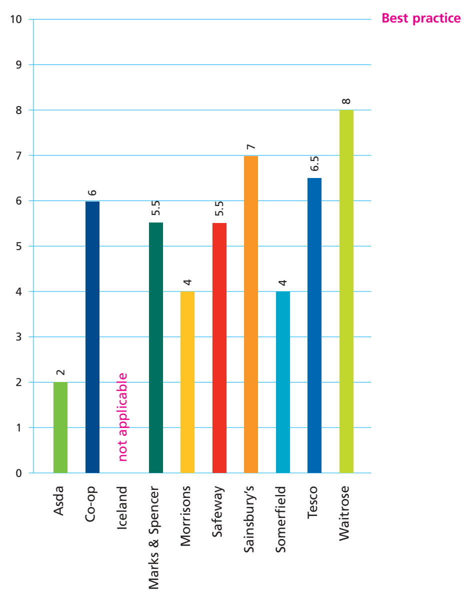
Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	Encouraging though, as with all companies, still a long way to go.	4½/10
Labelling information		
Nutrition labelling	Needs to be more consistent. Declared 'full 8' on all products but falls down on not translating sodium into salt on all products surveyed.	8/10
Use of Guideline Daily Amounts	Provided GDAs for Calories, fat and salt on many - but not all products. Needs to build on achievements.	5½/10
Interpretative Nutrition Labelling	No show. Needs to show greater commitment to helping shoppers make healthier choices.	0/10
In-store promotions		
Balance of healthy/less healthy snacks	Good work. Second only to M&S in this class.	6½/10
Snacks at the checkout	Provided (8 out of 36) snack-free checkouts. Not enough to score higher.	4/10
Customer information & advice		
Healthy eating leaflets	None available. Needs to make more effort.	0/5
Information from customer help desk	Poor. Staff provided incorrect information and were unable to provide requested advice. Not good enough.	0/5
Overall comments and score	Safeway scored higher in virtually all respects than its take over company Morrisons, raising questions over whose standards will prevail in future. Only pipped by M&S for its fruit displays but falls down on labelling and in-store information and advice. Overall ranking equal 5th place.	3½/10

Name: Tesco

Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	Average performance - needs to work harder to cut excess salt. Offers good range of 'healthier' alternatives though Tesco 'wholesome' white bread was among the saltiest in our survey.	3½/10
Labelling information		
Nutrition labelling	Inconsistent. Provides the 'full 8' but translation of sodium into salt lacking on several products.	6/10
Use of Guideline Daily Amounts	Inconsistent. Provides separate GDAs for men and women, but GDAs for Calories, fat and salt provided on only some products.	2½/10
Interpretative Nutrition Labelling	Front-of-pack Calories, fat and salt - but on just one product in our survey.	1/10
In-store promotions		
Balance of healthy/less healthy snacks	Middle ranking - fruit made up just under a third of 'snack' shelf space.	4/10
Snacks at the checkout	Good. Just 4 out of 40 checkouts with snacks but all at child height. Time to remove them all.	9/10
Customer information & advice		
Healthy eating leaflets	Poor. None available in-store.	0/5
Information from customer help desk	Poor. Staff could not provide information or advice. Suggested contacting helpline.	0/5
Overall comments and score	Poor score from UK's largest retailer, Tesco doesn't lead in any indicator category. Needs to put more energy into helping customers eat more healthily. Needs to work on all aspects - particularly its nutrition information and advice, nutrition labelling and salt reduction plans. Overall ranking 5th equal and behind Sainsbury's.	3½/10



Retailers' scores for in-store promotions

Note: Scores have been rounded to nearest 0.5

3. In-store promotions

Applying our two in-store promotion Health Indicators (shelf space devoted to 'healthy' foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery) and presence of 'less healthy' snacks at the checkout) we found:

- Top scorer in this category was Waitrose – with no snacks at the checkout. M&S devoted more (46 per cent) and Safeway as much shelf space (33 per cent) as Waitrose (31 per cent) to fruit relative to 'less healthy' snacks. Neither M&S nor Safeway scored as well on removing 'less healthy' snacks – including sweets at child height – from checkouts.

- Asda was bottom scorer on removing 'less healthy' snacks from checkouts with 'less healthy' snacks at all thirty-five checkouts in the store we surveyed – all at child height.

- The majority of retailers placed much greater emphasis on the promotion of 'less healthy' foods and snacks – including foods high in sugar – than healthier foods. We found many eye-catching special offers, including price discounts dominated by 'less healthy' snack foods, confectionery, soft drinks and sugared breakfast cereals, many linked – because of the timing of our survey – to football, or targeting children using film tie-ins.

- We excluded Iceland from this rating. As a retailer of mainly frozen foods we considered it inappropriate to compare shelf space devoted to 'healthy' foods (fruit) to 'less healthy'. In the store we surveyed there was just one dump-bin of bananas. We would like to encourage Iceland to stock a wider range of fresh fruit and vegetables.

Name: Asda

Date of report: June 2004

Subject area	Comments	Marks
Nutritional content		
Salt content of standard own-brand foods	Has more work to do to remove excess salt from 'standard' products. Asda 'wholesome' white bread was among the saltiest in our survey.	4/10
Labelling information		
Nutrition labelling	Good. All products surveyed gave 'full 8' nutrition information and translated sodium into salt.	10/10
Use of Guideline Daily Amounts	Inconsistent work - GDAs on 3 out of 20 products but also used confusing 'percentage Calories from fat'.	1½/10
Interpretative Nutrition Labelling	A start but much more work to do.	1/10
In-store promotions		
Balance of healthy/less healthy snacks	Poor. Four times as much shelf space devoted to crisps, biscuits and sweets compared to fruit.	4/10
Snacks at the checkout	Bottom of the class. 35 checkouts all with sweets and all at child height.	0/10
Customer information & advice		
Healthy eating leaflets	Unhelpful - no leaflets available in-store.	0/5
Information from customer help desk	Good attempt - but needs to train staff better. Helpline failed to respond.	2½/5
Overall comments and score	This now second largest UK supermarket chain - part of the giant US Walmart empire - needs to flex its muscle more to help its customers fight the flab and eat more healthily. Only makes it to 7th place. Needs to work harder on all subjects.	3/10

Name:	Somerfield	
Date of report	June 2004	
Subject area	**Comments**	**Marks**
Nutritional content		
Salt content of standard own-brand foods	*Poor. Many of its products were among the saltiest in our survey. Needs to take salt reduction more seriously.*	2½/10
Labelling information		
Nutrition labelling	*Provides the 'full 8' but translation of sodium into salt lacking on several products - including some high in sodium.*	6/10
Use of Guideline Daily Amounts	*Inconsistent. We found sporadic use of GDAs.*	2/10
Interpretative Nutrition Labelling	*None found.*	0/10
In-store promotions		
Balance of healthy/less healthy snacks	*Poor. Somerfield rates towards to bottom of the class with the highest percentage of 'snack' shelf space devoted to confectionery in our survey.*	3/10
Snacks at the checkout	*Could do better. Only half the checkouts with 'less healthy' snacks - but all at child height.*	5/10
Customer information & advice		
Healthy eating leaflets	*Poor. None available.*	0/5
Information from customer help desk	*Unhelpful. Unable to provide information or advice requested. Advised that Somerfield has no helpline.*	0/5
Overall comments and score	*Not a star performer, Somerfield is struggling to keep up with the rest of the class. The company needs to make more effort and work towards targets in all categories. Overall ranking 8th.*	2½/10

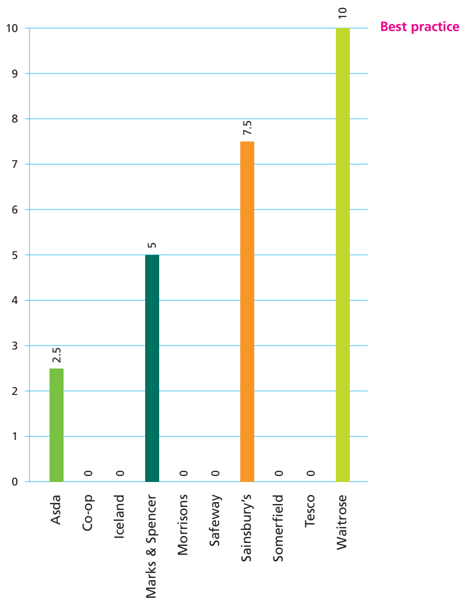
Name:	Morrisons	
Date of report	June 2004	
Subject area	**Comments**	**Marks**
Nutritional content		
Salt content of standard own-brand foods	*Bottom of the class with saltiest foods - shopping at Morrisons rather than the Co-op could mean up to 25% more salt in your diet. Offers a good range of 'healthier' alternatives and best in its class for 'Better for You' white sliced bread showing Morrisons can make the grade when it tries. Needs to take salt reduction more seriously.*	1½/10
Labelling information		
Nutrition labelling	*Poor. Virtually only company not to provide 'full 8'. Several products declared only 'big 4' and one product - sausages - no nutrition information at all. Must try harder. Translation of sodium into salt not consistently on all products.*	7/10
Use of Guideline Daily Amounts	*Provides GDAs for both men and women but only on a few of the products surveyed. Must be more consistent.*	2½/10
Interpretative Nutrition Labelling	*None provided.*	0/10
In-store promotions		
Balance of healthy/less healthy snacks	*Poor: only 16% of 'snack' shelf space devoted to fruit.*	3/10
Snacks at the checkout	*All 28 checkouts carried 'less healthy' snacks - but none at child height. Could go further and remove temptation from adults too.*	5/0
Customer information & advice		
Healthy eating leaflets	*None available. Needs to do more homework on this project.*	0/5
Information from customer help desk	*Couldn't provide requested information or advice but staff did suggest contacting helpline.*	0/5
Overall comments and score	*With the highest salt content of all companies and a long way to go in all categories we'd like to see Morrisons use some of Safeway's expertise to turn this now third largest retailer into a top player for health. Overall ranking, 9th bottom of the class.*	2/10

4. Customer information and advice

Applying our customer information and advice Health Indicator (Information and advice on healthy eating available in-store) we found:

- The majority of our retailers failed to get off the starting blocks – scoring zero for this section. These retailers were unable to provide information and advice requested through their customer information desks and we did not find information and advice on nutrition via leaflets in the stores we surveyed.

- Waitrose was the only retailer whose staff could correctly provide information and interpretation on salt from food labels, while only Waitrose, M&S and Sainsbury's had information leaflets on diet and health available in the stores we surveyed.



Retailers' scores for in-store information and advice

Name:	Iceland	
Date of report	June 2004	
Subject area	**Comments**	**Marks**
Nutritional content		
Salt content of standard own-brand foods	Scored relatively highly but on limited sample due to small range of own-label foods. Only company not to offer own 'healthy eating' range.	$5\frac{1}{2}$/10
Labelling information		
Nutrition labelling	Good. Provides full 8 information and consistently translated sodium into salt on all products surveyed.	10/10
Use of Guideline Daily Amounts	Bottom of the class - only company to provide no GDAs on products surveyed.	0/10
Interpretative Nutrition Labelling	None given.	0/10
In-store promotions		
Balance of healthy/less healthy snacks	Impossible to score overall as they sell such limited amounts of fresh fruit.	n/a
Snacks at the checkout	Could try harder - we found 3 out of 4 checkouts with 'less healthy' snacks.	$2\frac{1}{2}$/10
Customer information & advice		
Healthy eating leaflets	None available	0/5
Information from customer help desk	Staff unable to help or advise but did suggest contacting company helpline.	0/5
Overall comments and score	Hard to compare this predominantly frozen food retailer with virtually no fresh fruit and veg in-the store we surveyed and limited own-label range. The only store to give no interpretative (GDA) information on food labels.	n/a

The NCC's recommended action for government

We call on the Department of Health to:

- Provide leadership and clear messages on health and nutrition that retailers can support.
- Incorporate the NCC's Health Indicators for retailers in the forthcoming Food and Health Action Plan.
- Audit and publish progress annually.
- Introduce regulatory requirements if a voluntary approach is not effective.

We call on the Food Standards Agency to:

- Adopt the NCC's Health Responsibility Index and establish annual surveys to monitor supermarkets' progress towards achieving Health Indicator targets.
- Build on its approach to salt and develop food-based targets for fats, saturated fat and sugar.
- Issue 'best practice' guidance on nutrition labelling information, including 'traffic light' signposting of key nutrients or of 'healthier' and 'unhealthier' foods; in-store promotion and information and advice.
- Work with retailers and their trade bodies to encourage 'best practice' throughout the whole industry.

We call on the Department for Environment, Food and Rural Affairs (Defra) to:

- Incorporate the NCC's Health Responsibility Index in Defra's Food Industry Sustainability Strategy (FISS).

The NCC's 20 action points for retailers

We call on retailers to:

1. Publish a strategy with clear targets to improve scores for all of the NCC's Health Indicators.

2. Build the NCC's Health Indicators into Corporate Social Responsibility target setting and reporting at Board level.

3. Work co-operatively with the government to develop targets to support government commitments to tackle obesity and diet-related ill-health.

4. Work collaboratively across the food industry and with government to develop common approaches.

Nutritional composition

5. Commit to achieving FSA salt targets for all own-label foods by 2006.
6. Work with the FSA to develop targets for fat and saturated fat and explore feasibility of setting targets for sugar, fibre and micronutrients.
7. Work co-operatively with other retailers and trade bodies to address technological challenges in changing recipes.
8. Encourage manufacturers of brands stocked in stores to reduce excess salt, fat and sugar.

Nutrition labelling

9. Provide 'full 8' nutrition information on all products
10. Translate sodium content into a salt figure for all products.
11. Declare GDAs on all products, not just on products branded as 'healthier', using a standard format approved by the FSA.
12. Provide front-of-pack interpretative 'traffic light' signposting of healthier and 'less healthy' foods on all own-label foods, in promotional material and on shelf tags using FSA nutrient profiling criteria and standard format.

In-store promotions

13. Place greater emphasis on the promotion of healthier products by setting and monitoring targets for promotions of healthier products relative to 'less healthy' products.
14. Remove opportunities for 'impulse purchases' of 'less healthy' snacks including removing them from all checkouts.
15. Cease promotion and marketing of 'less healthy' foods to children.
16. Support public health campaigns such as '5 A Day' and FSA salt awareness campaign.

Customer information and advice

17. Improve the provision of information in-store, at customer advice desks, promotional tables, in in-store magazines and leaflets, and through websites and helplines.
18. Provide full nutrition and ingredient information (including per cent by weight) for all products on website.
19. Introduce a programme of staff training to support the provision of customer information and advice.
20. Work with Primary Care Trusts to provide impartial 'personal' shopping advisers for customers referred from dietitians/GPs to support them in understanding how to make healthier choices in line with Department of Health (DoH)/FSA recommendations.

The NCC's Health Indicators

Nutritional content
- Sodium (salt) content of ten everyday own-label processed foods.

Labelling information
- Nutrition information provided on food labels: declaration of 'full 8' nutrients and translation of sodium content into salt.
- Use of Guideline Daily Amounts (GDAs) on nutritional labelling.
- Use of interpretative 'high/medium/low' or 'traffic light' nutrition labelling.

In-store promotions
- Shelf space devoted to 'healthy' snack foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery).
- Presence of sweets and 'less healthy' snacks at the checkout.

Customer information and advice
- Information and advice on healthy eating available in-store.

Our research methods

In this project we developed seven 'Health Indicators' as a means to measure and compare the practices of supermarkets towards healthy eating. In doing so, we drew on the experience of the 2001 Race to the Top initiative which was designed to improve food retailers' performance on social, ethical, health and environmental issues in a co-operative way[4]. This developed and sought to apply comparative indicators for supermarkets' practices on a range of issues related to sustainability, including 'health'.

Race to the Top relied for the most part on extensive, self-reported data from the six retailers that participated. This proved to be one of the major stumbling blocks for the project, which eventually foundered because a number of companies declined to co-operate.

For our Health Responsibility Index we therefore used a different, more consumer-focused approach – collecting data on retailers' practices by undertaking our own surveys within selected 'flagship' stores. We enlisted the Food Commission as consultants to work with us to develop the methods and undertake the survey work. While they used researchers with nutrition or dietetics qualifications, our in-store information collection surveys were designed to reflect the experiences of ordinary shoppers. After a pilot survey we worked with the Food Commission and other advisers to fine-tune the methods before going ahead with the full survey. Subsequently we wrote to retailers requesting details of any relevant company policies.

We decided to exclude Iceland from the overall scoring as we were unable to apply the in-store promotions indicator.

(Company policies are reproduced in Appendix 1.)

[4] Race to the Top was a collaborative alliance of six major national retailers and 24 national environmental, health, public-interest and farming organisations, coordinated by the International Institute for Environment and Development and funded by Defra. See www.racetothetop.org

What we surveyed

Our survey investigated supermarket practices and policies in four key areas for which we developed seven indicators. We have used these indicators to benchmark retailers' practices:

1. Nutritional content: the nutritional value of 'own-label' foods.

- Indicator: sodium (salt) content of ten everyday 'own-brand' foods.

2. Labelling information: the nutrition information that the supermarket provides on food labels.

- Indicator: 'full 8' nutrition information and translation of sodium into salt provided on food labels.
- Indicator: use of Guideline Daily Amounts (GDAs) on nutritional labelling.
- Indicator: use of interpretative 'high/medium/low' or 'traffic light' nutrition labelling.

3. In-store promotions: the ways products are highlighted and promoted in-store.

- Indicator: shelf space devoted to 'healthy' foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery).
- Indicator: presence of sweets and 'less healthy' snacks at the checkout.

4. Customer information and advice: the information, interpretation and nutritional guidance that the supermarket offers in-store.

- Indicator: information and advice on healthy eating available in-store.

We recognise that retailers' policies also impact on people's food choices in other respects. For example, pricing policies, the location of stores and whether retailers help customers overcome difficulties with transport or other mobility needs. These supermarket policies were not part of this survey. Nor did we attempt to assess broader food safety or sustainability issues.

Our scoring system

The methods of measurement and comparison we applied to the data collected in-store are based on quantitative measures (for example, the declared sodium content of food products, the number of checkouts with 'less healthy' snacks at the checkout, the shelf space devoted to fruit relative to 'snacks', and declarations on food packaging). We have supplemented this with qualitative assessments (for example, of the information and advice on healthy eating available in-store).

For each indicator we determined a desirable 'target'. This is based on 'best practice', unless otherwise stated. Scores are allocated using a system that places each retailer along a scale of zero to ten. Ten is awarded for a product or practice that achieves the desirable 'target' level, and zero is awarded for a product or practice that represents the 'least desirable' level that we found in our survey. In most cases this is determined by a numerical calculation from the data collected. We indicate where scores are based on qualitative assessments.

To calculate the overall Health Responsibility Index score for each retailer, we have given equal weighting to each of the four key areas we have investigated – not to each of our seven indicators. Thus, the three indicators used to assess 'labelling information' practices have been given equal weight to the two used to assess 'in-store promotional' practices, the two used to assess 'in-store information and advice' and the one – sodium content – used to assess 'nutritional content'. The overall score for each retailer is calculated by averaging the four key area scores.

This approach allows supermarkets to be assessed relative to each other and also against an absolute 'best practice' target. If repeated the NCC's Health Responsibility Index will enable progress to be assessed and compared over time.

We recognise that, for most companies, some of the areas that we examined – particularly salt content, and nutrition labelling is 'work in progress'. Some product data may have changed since we undertook our survey. However, our scoring is based on what we found in stores in June 2004.

Choice of products

A sample of standard 'own-label' food products was chosen for the survey to represent a cross-section of basic foodstuffs eaten regularly and in reasonable quantity by a large number of supermarket customers. These included product categories which the FSA has included in its salt reduction model approach[5]. Surveyors purchased one sample of a standard own-label product in each of the following twelve product categories:

- Baked beans
- Canned tomato soup
- Cheese and tomato pizza
- Cornflakes
- Frosted breakfast cereal
- Pork sausages
- Salt and vinegar crisps
- Strawberry yogurt
- Sunflower/vegetable fat spread
- Tomato ketchup
- Tomato pasta sauce
- White sliced bread.

While relatively small, we consider the product sample size sufficient to provide an indication of retailers' practices towards salt content and also their general approach to nutrition labelling.

To ensure we compare, as far as possible, like with like, our choice of products excluded those associated with healthier descriptions such as reduced fat, sugar or salt, or healthy eating ranges such as *Healthy Living*, *Eat Smart* or *Good For You*. We also excluded products associated with special branding such as 'economy', 'premium' or other distinctive promotions such as children's food ranges.

Our choice of 'standard' products for our comparisons is to evaluate retailers' support for healthy eating for all customers, not just those who purchase, sometimes at a premium price, products carrying a 'healthier' description[6].

We did, however, record whether retailers offered a 'healthier' own-label version of each of the foods, either as part of a 'healthy eating' range or with healthier descriptions. We have used these products to provide illustrative examples of comparative salt, fat and sugar levels between 'standard' and 'healthier' products. The nutrition information provided on food labels for these products was also used to determine our three labelling Health Indicators.

In addition, samples of leading brands for each of the above product categories were purchased to enable illustrative comparison between own-label products and an indicative sample of proprietary brands for their salt, fat and sugar levels.

For each food category, Appendix 2 provides a list of the products surveyed in all three categories: 'standard' and 'healthier' own-label, and leading brand products.

5 www.food.gov.uk/multimedia/spreadsheets/saltmodel.xls

6 Health Which? 'Seven Sins of Healthy Eating Ranges' Consumers' Association, April 2003.

Choice of stores for inclusion in the survey

Our choice of ten retailers was determined by identifying the largest companies, by market share, with the requirement that all sell own-label foods. We recognise that not all retailers are the same. Some have many more outlets than others or seek to differentiate their offer. Iceland, for example, while selling a range of foods has an emphasis on frozen foods, while M&S sees itself primarily as a 'top up' food retailer specialising in treats and convenience foods. Others seek to appeal to different types and social class of shoppers.

The in-store research was undertaken shortly after the takeover of Safeway by Morrisons. The companies were continuing to trade under separate fascias and we conducted the survey as if they were separate companies. Some Morrisons branded products were on sale in the Safeway store we included in our survey, but we only surveyed Safeway branded foods in the Safeway store. Where a product is recorded as 'not found' in the Safeway store, a Morrisons own-brand product may have been available.

A single store for each supermarket was chosen on the basis of the store's 'flagship' status, its size, and its range of products. This information was collected in a telephone interview with each supermarket's press office and/or customer helpline. The aim was to identify a large store for each supermarket, selling a broad range of products, on the understanding that 'flagship' stores should represent the best practice for each retailer.

Occasionally, 'flagship' status was assigned by a supermarket only to small convenience-format stores. These were considered unsuitable for the survey since they were unlikely to offer a broad range of goods or to reflect a balance of products and promotional practices representative of the supermarket chain's operations, and therefore would not provide a suitable comparison.

Where a range of possible store options was identified that fulfilled the selection criteria, the final choice was made to ensure that a varied range of geographical locations around England was represented in the survey. The ten stores surveyed are shown on the map.

In-store surveys took place during the first three weeks of June 2004.

Measures of nutritional content

Key health messages promoted by the FSA and DoH are that people should reduce their consumption of dietary fats (particularly saturated fat), salt and sugars, and increase their consumption of fruits, vegetables and wholegrain foods.

We have developed Health Indicators to show how supermarkets are contributing to public health through reducing 'less healthy' nutrients in their own-label foods, and by increasing the promotion of healthier foods relative to 'less healthy' foods.

Salt

We chose the declared sodium content of a sample of ten out of the 12 own-label 'standard' foods as our Health Indicator. (Sodium is a component of salt. To find the amount of salt per 100g, multiply the sodium level by 2.5. Sodium values are quoted throughout this report.) We used the FSA salt model 'target average' levels[7] as our target by which to benchmark retailers' practices.

We did not include yogurt, as it is not included in the FSA salt reduction targets, nor frosted breakfast cereal because our survey already included cornflakes.

Fat

We explored a similar approach to developing Health Indicators for declared fat and saturated fat content. However, several difficulties became apparent from our pilot survey that needed to be addressed. First, unlike salt, no food-based targets currently exist for total fat or saturated fat. In addition, a single numerical measure for 'total fat' would not take into account any positive work a retailer may have done to replace saturated fats and trans-fats with healthier polyunsaturated and monounsaturated fats.

We therefore did not feel able to develop an indicator based on the data we collected. However, we have used FSA definitions of 'a lot' and 'a little' fat, and saturated fat per 100g as our basis for an exploratory approach to assessing fat and saturated fat content in a small sample of products, although we have not included this data in our Health Responsibility Index. We further discuss the challenges that would need to be addressed before taking this work forward in Chapter 4: Taking it forward.

Sugar

We also explored whether a Health Indicator could be developed for sugar in sweetened foods such as sweetened breakfast cereals, biscuits, cakes, desserts, confectionery, sauces and soft drinks. However, as with fat, several difficulties became apparent from our pilot survey that would need to be addressed before taking this work forward. First, dietary guidelines distinguish between intrinsic and extrinsic, and milk and non-milk sugars. 'Extrinsic' sugar has been processed from its original source – for example, table sugar or fruit juice – whereas 'intrinsic' sugars remain integral to the food such as sugar in fruit. We are advised to reduce both total consumption and frequency of consumption of non-milk extrinsic (NME) sugars. However, food labels only declare total sugar content, if they declare it at all. Second, as with fat, no food-based targets currently exist for sugar.

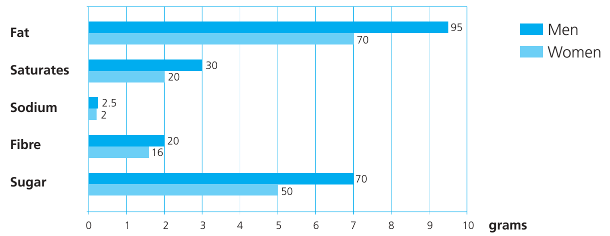
We can see some value in developing an indicator that would encourage reductions in the sugar content of 'sweet' foods, particularly sugared breakfast cereals, yogurts and other dairy desserts, and sweetened savoury sauces. But we conclude that targets to help reduce sugar consumption more broadly demand an additional approach. For foods such as confectionery, sweet biscuits, cakes and soft drinks, we see far more limited scope for reducing sugar content. Rather, the focus for sugar reduction needs to lie in consuming these foods and drinks less often. We have therefore developed separate Health Indicators – that measure the relative emphasis retailers place on promoting sugary products through shelf space, special promotions and impulse purchase displays – as a means to judge the extent to which retailers' practices help, or hinder, healthier choices.

Micronutrients

We recognise that micronutrients, such as vitamins and minerals, are also an important factor in assessing the total nutritional quality of foods. However, since information about the micronutrient content of foods is not easily available and is rarely declared on food labels, an indicator of micronutrient quality of the foods was not attempted for this research.

Measures of labelling information

Food labels are an important source of nutrition information for consumers. Currently the FSA, food companies and their trade bodies are developing ways in which food labels can provide more useful information to help consumers



Guideline Daily Amounts for Men and Women

Source: Rayner M. et al, The origin of Guideline Daily Amounts, Public Health Nutrition, 2003

make healthier choices. We have developed three Health Indicators to benchmark retailers' progress in this respect.

The source of data for these indicators was the labels of the 12 'standard' and, where found, the 'healthier' equivalent products collected for this survey.

Nutrition information provided on food labels:
If companies provide nutrition information on food labels, the law currently requires they use a prescribed format – either declaring the 'Full 8' nutrients (of energy, protein, fat, saturated fat, carbohydrate, sugars, fibre and sodium) or a shortened version of the 'Big 4' (energy, protein, fat and carbohydrate). Most companies make voluntary declarations as the law currently only requires the declaration of nutrition information on food labels if a health or nutrition claim is made. We determined our 'best practice' target was declaration of 'full 8' nutrients.

'Sodium' is not well understood by consumers. Our 'best practice' target includes a translation of the sodium content into salt on the nutrition panel.

Use of Guideline Daily Amounts (GDAs) on nutritional labelling:
GDAs are based on recommendations by the government's Committee on Medical Aspects of Food and Nutrition Policy (COMA). They are amounts that provide a guide to assist consumers to understand to what extent the amounts in food contribute towards 'healthy' daily amounts. They are based on requirements for 'average' adults of normal healthy weight. Their use is now supported by the Institute of Grocery Distribution, the British Retail Consortium and the Food and Drink Federation.

Our target was provision of GDAs for calories, fat and salt declared.

Use of interpretative nutrition labelling:
There is much evidence that consumers find it difficult to understand, interpret and use nutrition labelling to help them make healthier choices. Interpretative nutrition labelling is intended to assist consumers in this respect. In 1986, the Co-op introduced its 'banding scheme' which interprets nutrient content data on nutrition panels as 'high', 'medium' or 'low'. More recently, there have been strong calls for a front-of-pack interpretative labelling such as a 'traffic light' scheme, including from the Health Select Committee on Obesity[8]. The NCC is promoting the development of nutrient profiling as a basis for developing labelling schemes that help consumers identify food that are 'healthier' and those which are 'less healthy'[9]. The FSA is currently considering options for interpretative labelling including 'traffic light' schemes. Since our survey was conducted, Tesco has announced that it is developing its own version of 'traffic light' labelling[10]. Our target was use of front-of-pack 'traffic light' interpretative nutrition labelling.

Nutrition and health claims
We did not examine companies' use of nutrient claims such as 'high in fibre', fat-free claims or more general health claims stating or implying links between particular foods and health or diseases.

Measures of in-store promotions

The ways in which products are highlighted, promoted and positioned in-store impacts on consumer choices. We have used two Health Indicators to explore the emphasis retailers give in-store to the promotion of 'healthy' relative to 'less healthy' foods.

Shelf space devoted to 'healthy' foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery):
For this indicator, we compared the shelf space devoted to fruit relative to shelf space devoted to sweet biscuits, crisps, savoury snacks and confectionery, as a means to explore the relative emphasis retailers place on 'healthy' compared to 'less healthy' foods. We chose fruit to represent healthier foods that can also be eaten as snacks and compared this with shelf space devoted to 'less healthy' snacks. We were not seeking to measure the absolute relativity of all 'healthy' or 'less healthy' foods in each store.

Surveyors – one in each store – recorded the shelf length in paces and multiplied this by the number of shelves devoted to fruit displays. This was then compared with the shelf length and number of shelves devoted to sweet biscuits, confectionery, crisps and savoury snacks within the store. Our use of proportional measures enabled consistent comparisons to be made. We set our 'target' for this indicator slightly above the best practice that we found in this survey, at a ratio of 50:50. Iceland were not included in this section as they sell very little fresh fruit.

Presence of 'less healthy' snacks at the checkout:
For our second Health Indicator, retailers were allocated scores according to how many of their checkouts featured displays of confectionery, crisps and soft drinks. Retailers scored more highly the greater the percentage of checkouts without 'less healthy' snacks. Penalty points were given for positioning such displays at child height, thus encouraging 'pester power'. Our target was the best practice that we found – no sweets or 'less healthy' snacks at checkouts.

In addition to collecting data for these two indicators, our researchers also made qualitative assessments of other in-store promotions including special offers and 'buy one, get one free' offers, '5 A Day' promotions, and promotions aimed at children. This provides interesting information on retailers' practices that we summarise on page 34. However, we have not developed indicators to measure these, nor does this data contribute to our Health Responsibility Index.

Measures of customer information and advice

We have assessed the availability of nutritional information, interpretation and advice that the supermarket offers in-store. Our indicator comprises two parts. First, surveyors noted the availability and collected any leaflets that provided information and advice to customers on healthy eating.

Second, we assessed the information and advice available from retailers' in-store customer advice desks. In an 'anonymous shopper' exercise, researchers approached staff at the customer advice desk in each store and asked for information about the salt content of a can of own-label tomato soup (or brand-leader Heinz in Iceland where own-label soup was not available). They asked the following questions:

- First, the surveyor asked: 'How can I find out how much salt this contains?'
- If staff were able to answer the first question, the surveyor asked: 'Is that high salt, or low salt?'
- If staff were able to answer the question, the surveyor asked: 'I'm giving this to a five-year-old – how can I find out how much salt a five-year-old should eat?'
- If staff were not able to answer the questions, the surveyor asked: 'Do you have a customer helpline I can call?'

Our indicator is based on our assessment of the availability of information and advice on healthy eating available in-store through leaflets (possible five marks) and via customer advice desks in the stores surveyed. The provision of correct information on salt content scored 2.5 and correct interpretation scored an additional 2.5 giving a total of a possible five marks. For the purpose of this survey, our target is the good availability of correct information and advice via both leaflets and customer advice desks. We did not seek to include or assess information or advice available from company helplines or websites.

[7] see reference 2.

[8] House of Commons Health Select Committee report on Obesity, 2004.

[9] Traffic lights for food? NCC, 2004.

[10] Tesco, 'Tesco gives healthy eating the green light', press release, May 26, 2004.

How the supermarkets scored

1 Nutritional content of supermarkets' own-label foods

The salt content of own-label food

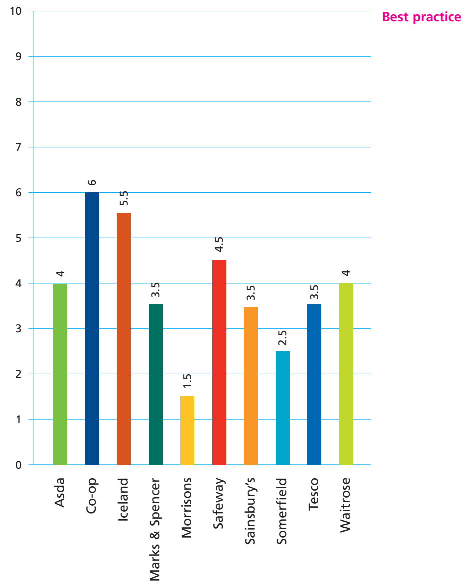
The sodium content of ten 'standard' foods were compared to the FSA's 'target average' sodium levels for the following product categories.

- Baked beans – 0.35g / 100g
- Canned tomato soup – 0.2g / 100g
- Cheese and tomato pizza – 0.3g / 100g
- Cornflakes – 0.3g / 100g
- Pork sausages – 0.55g / 100g
- Salt and vinegar crisps – 0.55g / 100g
- Sunflower/vegetable fat spread – 0.4g /100g
- Tomato ketchup – 0.6g / 100g
- Tomato pasta sauce – 0.25g / 100g
- White sliced bread – 0.35g / 100g

The sodium content and the score out of ten NCC allocated for each product are shown in Appendix 2, along with a leading brand comparison for each category.

To provide an overall score for our indicator we have given equal weight to each of the product categories. We have added the scores for each and then divided this total by the number of products surveyed to convert to a score out of ten. On this basis we have ranked the retailers as shown in the table opposite.

The score is an indicator of how close to FSA targets the retailer is overall relative to other retailers. While a score of ten would indicate that the FSA sodium targets were met or exceeded for all ten product categories surveyed, it is important to note that a score of six out of ten, for example, does not mean that the retail met FSA targets for six out of ten products.



Retailers' scores out of ten for the sodium content of a sample of 'standard' own-label products

Note: Scores have been rounded to nearest 0.5

Analysis

On the basis of our sample of own-label 'standard' foods we found considerable variations between the retailers in the salt profile of these products, in relation to the FSA targets for sodium reduction. Comparing the declared sodium content of the foods we surveyed from those stores with the bottom and top scores, we calculate that where you shop could add up to as much as 25 per cent more salt to your diet.

As the chart shows, no retailer scored highly overall. The Co-op rated highest, scoring six out of ten, Iceland (on a reduced sample size) achieved 5.5, with Safeway achieving 4.5, and Waitrose and Asda four out of ten. Sainsbury's, Tesco and M&S all scored 3.5. Somerfield and Morrisons' own-label foods had the saltiest profiles – scoring only 2.5 and 1.5 out of ten respectively. Clearly all retailers have considerable work to do to achieve the FSA targets – and score ten out of ten – in all categories.

Staggeringly, out of over 100 'standard' products that we surveyed, only two met the FSA targets for sodium – Co-op's Pork Sausages and Safeway's Tomato Pasta Sauce (though meeting FSA target levels does not necessarily imply that the product is a 'low salt' product). By comparison, more products marketed by companies as 'healthier' met the FSA target, but we were still surprised that only just over a third (37 per cent) of the 62 'healthier' products we surveyed met FSA sodium targets.

Within some product groups we also found considerable variations between retailers. For example:

- M&S Tomato Pasta Sauce with 0.79g sodium/100g (three times the target level) has the highest level – four times as much sodium as the Safeway product (0.2g/100g), which has the lowest level of all pasta sauce products surveyed.

- Waitrose sunflower spread (0.8g/100g) was twice the target level and significantly higher than the lowest in our survey – Co-op (0.5g/100g).

Cornflakes was one product for which we found less variation between retailers. Virtually all retailers' own-labels contained 0.9g/100g – three times as much sodium as the FSA salt reduction target (0.3g/100g) – while Safeway's product (1g/100g) and Kellogg's (0.95g/100g) brand leader contained slightly more. Consumers might not expect breakfast cereals to be high in salt but on the basis of our survey they would find it difficult to choose a lower salt cornflake cereal.

Brand comparisons

In virtually all product categories the leading brand rated poorly compared to the majority of retailers' products. For example, Kellogg's cornflakes, Heinz tomato ketchup, Hovis white sliced bread, Walkers crisps and Wall's pork sausages were among the saltiest products in their categories by comparison with the supermarket own-label products that we surveyed.

Goodfella's pizza (at 0.4g/100g sodium) was a rare example where our brand comparison scored favourably with the best retailers' products. Heinz scored alongside the best retailers on baked beans but only mid-range with its tomato soup and less well with its tomato ketchup (this survey was conducted before Heinz made further significant salt reductions).

Healthier products

We asked our surveyors to look for comparable products that were described or promoted on the label as 'healthier'. Within our ten categories we found Sainsbury's, Morrisons and Tesco offered the greatest choice of 'healthier' alternatives. Iceland, Somerfield and M&S provided the least.

In all the stores surveyed, except Iceland, we found products as part of the retailers' own 'healthy eating' range of own-label foods variously described as *Good for You* (Asda), *Healthy Living* (Co-op), *Count on Us* (M&S), *Better for You* (Morrisons), *Eat Smart* (Safeway), *Be Good to Yourself* (Sainsbury's), *Good Intentions* (Somerfield), *Healthy Living/Healthy Eating* (Tesco) and *Perfectly Balanced* (Waitrose). In addition we found 'healthier' alternatives that were not part of these ranges. We did not seek to conduct a full survey or analysis of these product ranges, rather we have used examples to compare to retailers' standard products. The products that we used for these comparisons are shown in Appendix 2.

Generally the healthier choices were lower in sodium than standard products. For example:

- Tesco, Asda, Sainsbury's and Waitrose healthier cheese and tomato pizzas all met the FSA sodium targets while their regular versions contained more – up to twice as much in the case of Waitrose and three times as much in the case of Tesco.

- Waitrose, Morrisons, Safeway, Sainsbury's and Tesco all offered reduced sugar and salt ketchup, with all except the Tesco product meeting the FSA target.

- Morrisons' *Better for You* white sliced bread exceeds the FSA target and contained virtually half the salt of its standard product. None of the standard products met the target.

- Most retailers offered 'healthier' baked beans with virtually all exceeding FSA targets.

But not all healthier products performed better than standard products:

- M&S Extra Lean, Somerfield *Good Intentions* reduced fat and Safeway Butchers Choice 'less than 5% fat' 'healthier' pork sausages, although lower in fat, all contained higher levels of sodium than the standard pork sausages we surveyed.

- Asda and Tesco 'wholesome' white bread was among the saltiest in our survey – and saltier than their standard products.

- While being lower in fat, most of the healthier spreads contained as much or more (in the case of Co-op, Safeway, Sainsbury's) sodium as their standard counterparts.

- Morrisons' *Better for You* and the Co-op's *Healthy Living* Pasta Sauces both contained just as much salt as their standard versions – both in excess of the FSA's target.

We conclude that where you shop can affect your chances of eating more healthily. By reading food labels and shopping around between stores consumers could make healthier choices. But we recognise that shoppers may not have the time or knowledge needed to understand much information on food labels, and may lack choice about where to shop. These barriers – and our proposals – are discussed further in Chapter 4: Taking it forward.

We explored using our indicators approach to examine 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)
- Pork sausages.

FSA definition of a 'lot' and a 'little':
Fat – a 'little' is less than 3g/100g and a 'lot' is more than 20g/100g.
Saturated fat – a 'little' is less than 1g/100g and a 'lot' is more than 5g/100g.

This provided some interesting data. As we have indicated in Chapter 2: Our research methods, we have identified a number of challenges to using our approach with fat and saturated fat – not least the lack of FSA targets for product categories. For the purpose of this analysis we have used the FSA generic guidance on what is 'a lot' and 'a little' fat and saturated fat as a means of comparison.

Together with the small sample size we did not consider our data sufficient basis on which to compare and rate retailers. Therefore, this data has not been used as an indicator or in our overall scoring of retailers. We do, however, consider that our approach could be developed to benchmark fat and saturated fat content of products in the future and recommend that the FSA develops target levels.

Analysis

As with sodium levels, we found variations in the products offered by different retailers – particularly sausages and pizza, though less so for crisps. For example:

- The fattiest standard sausages in our survey (M&S - 29.1g/100g - and Morrisons - 27.2g/100g) had over twice the fat of the leanest (Waitrose - 13.3g/100g).

- The Asda pizza (6g/100g) contained half the fat of the fattiest - Waitrose (12.4g/100g) and Goodfella's (12.1g/100g), our brand comparison.

Brand comparisons

Our brand comparisons for sausages (Walls - 28.3g/100g) and pizza (Goodfella's - 12.1g/100g) were among the fattiest products in their categories that we surveyed.

Healthier products

All retailers except Iceland offered 'healthier' pork sausages, though we found fewer retailers offered comparable 'healthier' cheese and tomato pizzas or salt and vinegar crisps. In general the 'healthier' options offered significantly reduced fat and saturated fat content – cutting both by at least 50 per cent or more in most cases. For example:

- All the 'healthier' sausages contained significantly less fat – most offering a reduction of at least 50 per cent fat and in the case of Co-op and M&S some 90 per cent less fat.

- All four of the 'healthier' pizzas we found in Asda, Sainsbury's, Tesco and Waitrose came in under, or close to, the FSA measure of a 'little' fat (less than 3g/100g) and saturated fat (1g/100g).

As with fat and saturated fat, we explored our Health Indicators approach to examining the sugar content of a small sample of own-label 'standard' foods:

- Frosted cereal
- Strawberry yogurt
- Tomato ketchup.

FSA definition of a 'lot' and a 'little':
Sugar – a 'little' is less than 2g/100g and a 'lot' is more than 10g/100g.

With the small sample size we did not consider our data sufficient basis on which to compare and rate retailers, so this data has not been used as a Health Indicator nor included in our overall Health Responsibility Index. Within the caveats that we discuss under 'Our research methods', we consider that our approach could be developed to benchmark sugar content of products – such as those that we sampled – and recommend that the FSA develops target levels.

Analysis

All our ketchup, yogurt and frosted cereal samples rated as 'high' sugar products using the FSA definition of greater than or equal to 10g sugar.

As with sodium and fat levels, we found some variations in the sugar content of products offered by different retailers – particularly for tomato ketchup and to some degree for yogurt, though not for frosted cereal. For example:

- Co-op's tomato ketchup (30g/100g) had two-thirds (66 per cent) more sugar than the Safeway product (18g/100g).
- Safeway strawberry yogurt (16g/100g) contained a third more sugar (33 per cent) than the equivalent M&S product (12g/100g).
- All frosted cereals contained about the same amount of sugar – 38g/100g – meaning that over a third of these breakfast cereals is sugar.

Healthier products

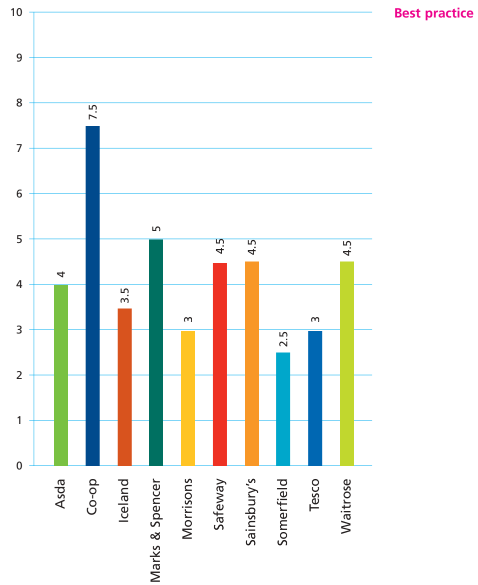
- 'Healthier' tomato ketchup – offered by Safeway, Sainsbury's, Waitrose, Morrisons and Tesco – provided 30-40 per cent less sugar.
- 'Healthier' yogurts from Tesco, Sainsbury and Safeway contained less sugar than the standard we sampled. However, the M&S, Somerfield and Waitrose 'healthier' product contained more sugar than the standard products we sampled. We were unable to judge whether this was due to extra sugar from the inclusion of more fruit in the product or from more added sugar.

2 Labelling information

In this section we provide the results and analysis from our survey of information provided on food labels and the three indicators that we developed:

- Nutrition information provided on food labels: target – declaration of 'full 8' nutrients (kcalories/kJoules; protein; carbohydrate; sugars; fat; saturates; sodium; fibre) and translation of sodium content into salt on the nutrition panel.
- Use of Guideline Daily Amounts (GDAs) on nutrition labelling: target – GDAs for calories, fat and salt declared.
- Use of interpretative nutrition labelling: target – use of front-of-pack interpretative nutrition labelling.

The following tables provides a summary of the scores that we have allocated to retailers for these three indicators.



Overall retailers' scores for labelling information

Note: Scores have been rounded to nearest 0.5

Analysis

- Overall, there is little consistency between the retailers and even between products from the same retailer in respect of many of the nutrition labelling practices we surveyed. Lack of consistency in presenting information is potentially confusing for consumers.
- The Co-op stood out in this category for the lead that it has taken in respect of our labelling indicators, particularly on consistently providing interpretative labelling.
- Only Asda, Co-op, M&S and Iceland consistently translated sodium information into salt.

Nutrition information provided on food labels:
Target – declaration of 'full 8' nutrients and translation of sodium content into salt on the nutrition panel.

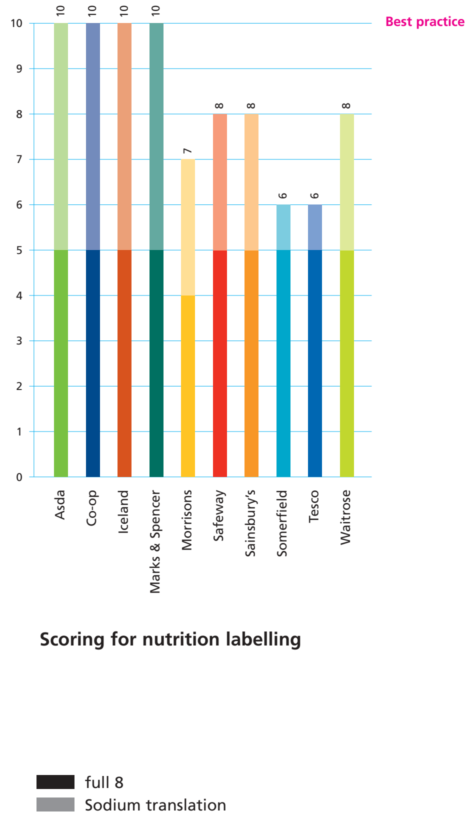
We found that, while there were many similarities between the supermarkets in the nutrition information provided on food labels, disparities were also revealed.

- In general, most supermarkets declared the 'full 8' nutrients on all products surveyed, with only a very few exceptions for individual products – notably Morrisons, where several products showed only the 'big 4' nutrients and one product (own-label pork sausages) carried no nutrition information at all.
- All of the supermarkets translated sodium information into the equivalent amount of salt on at least some of the products surveyed. However, only Asda, the Co-op, Iceland and M&S had done so on all of the products surveyed.
- Salt information was lacking on between two and four products from Morrisons, Safeway, Sainsbury's and Waitrose, and more commonly lacking on Somerfield products (six) and Tesco (seven).

We have allocated a possible maximum score of five for companies declaring the 'full 8' nutrients on all the 'own-label' products we surveyed, plus a further maximum five points for translating sodium information into the equivalent amount of salt, to give a possible total score of ten.

Brand comparisons

Virtually all our branded comparisons provided the 'full 8' nutrition information (Dolmio pasta sauce only provided the 'big 4') but only one product (Knorr Ragu pasta sauce) translated sodium into salt.



Scoring for nutrition labelling

Use of GDAs on nutritional labelling: Target – GDAs for calories, fat and salt declared.

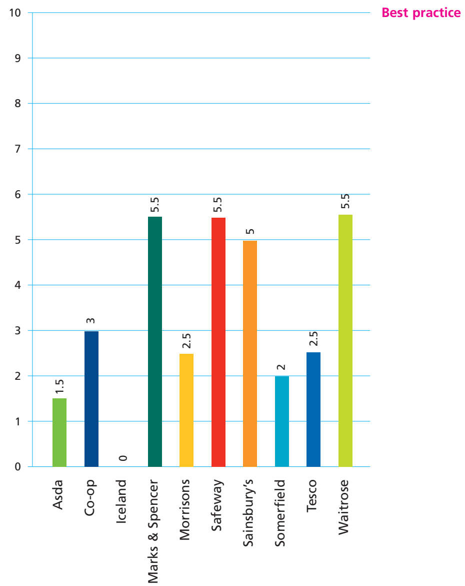
We found:

- Only Iceland gave no GDA information on any of the products surveyed, although the company has subsequently told us it is introducing these in 2005.

- Morrisons, Tesco and Somerfield were the only supermarkets that gave separate GDAs for women and men. Tesco added that 'requirements will vary with age, size and activity level'.

- Of those products that gave GDAs, the level of detail varied considerably, as follows:
- Asda gave GDAs for Calories, fat, saturated fat and salt on three out of 20 products (the only supermarket to give a GDA for saturated fat). On one of its 'healthier' products (a pizza), the GDA was given for people wishing to lose weight, but not expressed in terms of normal healthy weight maintenance. On six products, Asda described the fat content as 'percentage Calories from fat', with no information about what percentage of a daily intake of fat this represented, which we think is potentially confusing.
- The Co-op gave GDAs for Calories, fat and salt on five out of 17 products surveyed.
- M&S gave GDAs for Calories, fat and salt on nine out of 16 products.
- Morrisons gave GDAs for Calories, fat and salt on five out of 19 products.
- Safeway gave GDAs for Calories, fat and salt on ten out of 18 products.
- Sainsbury's gave GDAs for Calories, fat and salt on ten out of 21 products.
- Somerfield gave a GDA for salt on six products, and GDAs for Calories, fat and salt on one out of 13 products.
- Tesco gave GDAs for Calories, fat and salt on five out of 20 products. On one 'healthier' product (a strawberry yogurt), on which GDAs were not given, customers were advised to refer to the Tesco website for GDA information.
- Waitrose gave GDAs for Calories, fat and salt on ten out of 19 products.
- Few of the branded products we surveyed included GDAs. Walkers crisps included GDAs for fat and calories and Kellogg's Cornflakes included GDA for fat only – though the product is a low fat product.

We have used this data to allocate scores out of ten to the retailers for their use of GDAs on food labels. A zero is allocated for no provision of GDAs and a score of ten for GDAs on all products surveyed.



Scoring for use of GDAs

Note: Scores have been rounded to nearest 0.5

Use of interpretative nutrition labelling
Target – use of front-of-the-pack interpretative nutrition information.

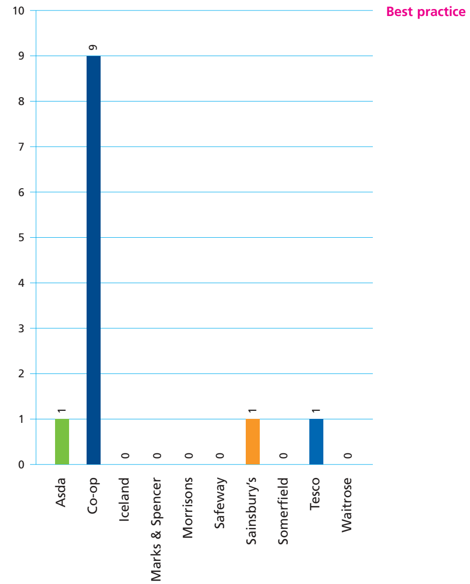
None of the retailers in our survey fully met this target.

The Co-op is the only retailer with a scheme that currently interprets nutrition information. All nutrient amounts, including fat, saturated fat, sodium and sugar levels are additionally described in the nutrition panel as 'high', 'medium' or 'low', though this is not displayed on the front of the pack. In addition, the Co-op was the only company to provide front-of-pack information on the amount of Calories, fat and salt per serving on all products we surveyed. For this reason we have allocated a score of nine out of ten – the top mark we awarded in respect of this indicator.

The only other companies to declare amounts of nutrients per serving on the front of packs were:

- Asda – which declared Calories, fat and saturated fat on two products in our survey;
- Sainsbury's – which declared Calories, fat and saturated fat – but only on four 'healthier' products; and
- Tesco – which declared Calories, fat and salt on one product in our survey.

While this is not 'interpretative' information it did indicate to us a willingness to consider how front-of-the-pack information could assist consumers and for this reason we have awarded one point to each of these companies.



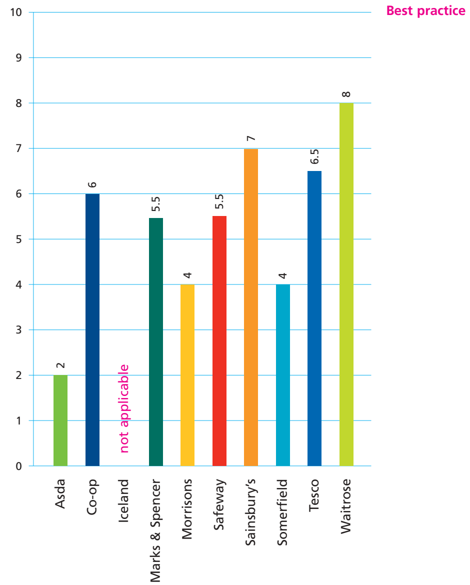
Scoring for use of interpretative nutrition labelling

3 In-store promotions

This section provides our findings and analysis of the range of products promoted by the supermarket through special displays, health messages and positioning within the store. We have used two indicators to explore the emphasis retailers give in-store to the promotion of 'healthy' relative to 'less healthy' foods:

- Shelf space devoted to 'healthy' foods (fruit) relative to 'less healthy' products (sweet biscuits, crisps, savoury snacks and confectionery): Target – 50:50
- Presence of 'less healthy' snacks at the checkout: Target – zero.

In addition, our researchers have made qualitative assessments of several other in-store promotions, including '5 A Day', special offers such as 'buy one, get one free' and promotions aimed at children. This is summarised opposite, though we have not developed indicators to measure these, nor does this data contribute to retailers' scores.



Overall retailers' scores for in-store promotions

Note: Scores have been rounded to nearest 0.5

Analysis

- We found considerable variation in the practices of retailers in respect of our indicators in this area.

- The majority of retailers placed much greater emphasis on the promotion of ‘less healthy’ foods and snacks – including foods high in sugar – than healthier foods. We found many eye-catching promotions supported by special offers – including ‘buy one, get one free’ offers and other promotions linked to football or targeted towards children, including film tie-ins.

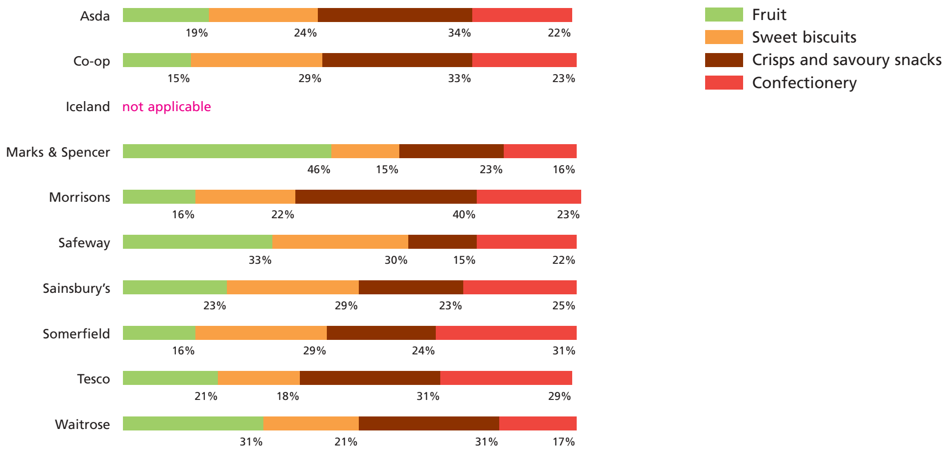
- Top scorer in this category was Waitrose – with no snacks at the checkout and virtually a third (33 per cent) of its ‘snacks’ shelf space devoted to fruit. While M&S devoted more (46 per cent) and Safeway as much (33 per cent) neither scored as well on removing snacks – including sweets at child height – from checkouts.

Shelf space devoted to ‘healthy’ relative to ‘less healthy’ foods

Surveyors recorded the shelf space (number of shelves x length) devoted to fruit displays and sweet biscuits, confectionery, crisps and savoury snacks within the store and calculated the percentage of the total that each category comprised.

The figures for confectionery are conservative, as they do not include smaller displays, such as impulse purchase placement among the lunchtime products and impulse purchase displays at the checkout.

This measure shows a diverse range of scores between supermarkets, giving an insight into the different emphasis on ‘healthy’ and ‘less healthy’ shelf space depending on the store, and also the considerable shelf space devoted to ‘less healthy’ foods.



Percentage of shelf space devoted to fruit relative to ‘less healthy’ snacks

Note: Figures have been rounded to nearest whole number

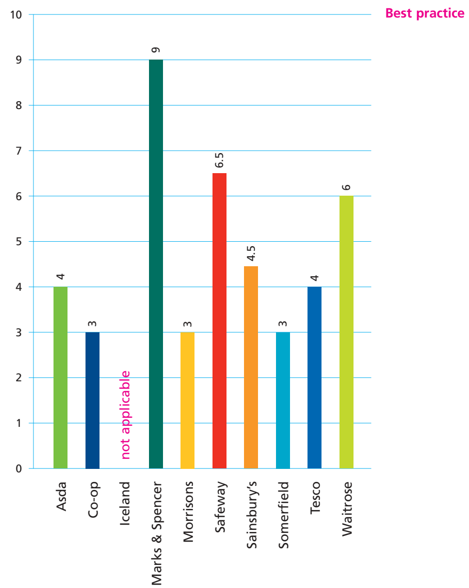
For example, the large Tesco store in Newcastle that we surveyed, by our estimation, devoted over one thousand, seven hundred feet of shelf length to crisps, savoury snacks, confectionery and sweet biscuits – that's about the length of five full-size football pitches.

Using this data and our target of a ratio of 50:50 we have allocated retailers with the scores shown in the chart opposite. We decided not to include Iceland in this rating.

From this 'snapshot' survey we cannot judge whether these findings would be replicated if a larger number and size of stores were surveyed. To our knowledge the only similar research – presented at a seminar on food poverty in 1999 – is a small scale study that compared floor space devoted to fresh fruit and vegetables compared with soft drinks[11]. This showed that those supermarkets with higher-income customers devote far more space to fruit and vegetables than soft drinks while the reverse is true in of the supermarkets with lower-income consumers.

It would appear that our findings are broadly comparable. The implications of this finding are discussed further in Chapter 4: Taking it forward.

[11] Sustain (1999) Tackling inequalities in health and diet-related disease: Developing successful inter-agency partnerships to promote fruit and vegetable consumption particularly to low-income groups



Scores for balance of healthy/ 'less healthy' snacks

Note: Scores have been rounded to nearest 0.5

'Less healthy' snacks at the checkout

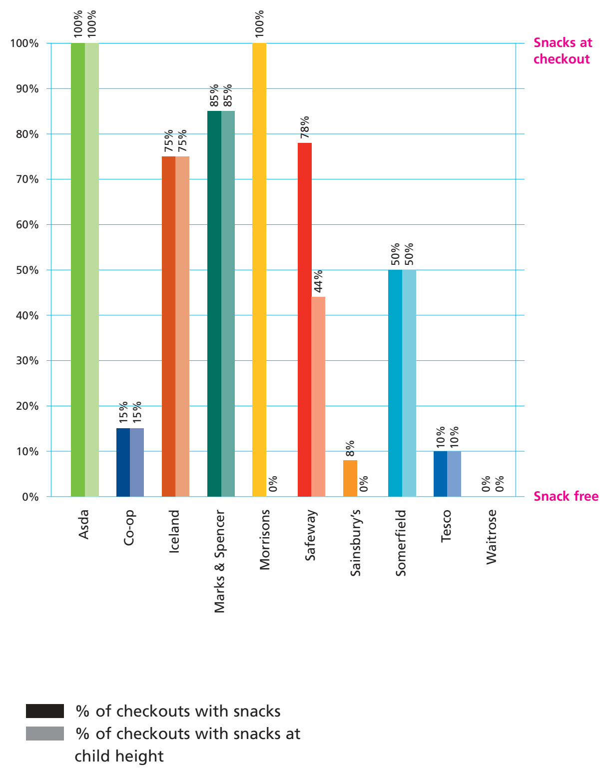
For our second indicator in this section we surveyed and allocated scores for how many of the checkouts in the retailers' stores in our survey feature displays of confectionery, crisps and soft drinks. Retailers also received penalty points for positioning such displays at child height, thus encouraging 'pester power'. The table opposite shows the results.

Waitrose, Sainsbury's, Tesco and the Co-op offered the greatest choice of 'snack-free' checkouts, with Waitrose scoring a full ten for having no snacks at any checkout. At the other end of the scale, Asda scored zero for having snacks at all 35 checkouts in the store we surveyed – all at child height. This is despite well-publicised moves by Asda to trial fruit displays at three in 20 checkouts in three stores in the UK[12]. The surveyor also noted that in Asda snacks placed at child height were oriented towards young children, for example lollies, Kinder Surprise chocolate eggs. Adult brands were on higher shelves.

M&S also ranked low for this indicator with 17 out of the 20 checkouts carrying snacks – all at child height.

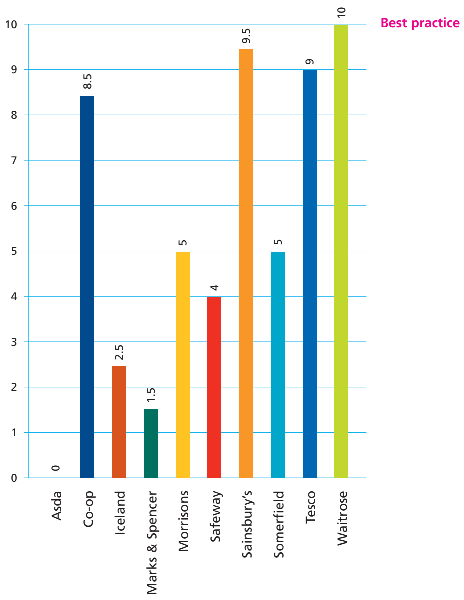
We are conscious that the size and design of retailers' premises may mean differing layouts in different styles of stores. However, our ranking is broadly in line with findings by the Parents Jury[13] which co-ordinates the 'Chuck Snacks off the Checkout' Campaign. This campaign has consistently rated Waitrose as the 'best' and Asda as the 'worst' with regard to displays of snacks at the checkouts.

Percentage of checkouts with 'less healthy' snacks and percentage at child height



[12] *The Guardian*, 'Asda to replace sweets with fruit at checkouts', press release 5 December, 2003.

[13] Parents Jury website www.parentsjury.org.uk (accessed July 2004).



Scores for 'less healthy' snacks at checkouts

Special offers and price promotions

In all of the stores, surveyors reported on the enormous visual impact of promotions, special offers (Buy One, Get One Free) and price discounts. Since some of the stores surveyed were large out-of-town outlets targeted at car-owning customers, surveyors also noted that many of the promotions encouraged bulk-buying, particularly of snacks, beer and soft drinks. Surveys took place during the first three weeks of June 2004, with many promotions linked to the Euro 2004 football championships, particularly for beer and snacks.

This was also a period of intense price-cutting activity, with a marketing campaign from Tesco offering products at exceptionally low prices. Surveyors noted that price-cutting seemed to be especially prominent on many poster displays – mainly in Tesco, Safeway and Morrisons, likely to be linked to the recent takeover of Safeway by Morrisons, and an ongoing re-branding of Safeway stores.

Surveyors reported that in most supermarkets, promotional activities were dominated by 'less healthy' snack foods, confectionery, soft drinks and sugared breakfast cereals. Fewer offers featured 'healthier' foods. Link-ups to popular current films like *Spider-Man*® and events such as the Euro 2004 football tournament were generally reserved for 'less healthy' snacks, confectionery, beer, soft drinks, cakes and biscuits. Notably, the same brand names were associated with such promotions in many of the stores.

The following details of displays in the Safeway store in our survey was fairly typical of what surveyors recorded in all stores, except M&S (where proprietary brands are not sold).

Promotions in a typical store

Large floor displays and prominent aisle-end shelf displays promoted products such as:

- Wagonwheel biscuits; Maryland chocolate chip cookies; Cadbury's Animals chocolate biscuits; Mini Cheddars snack biscuits;
- Two-litre bottles of Fanta; Robinson's orange squash; Multipacks of Pepsi, Tango and 7Up canned soft drinks;
- Kellogg's breakfast cereals – Ricicles, Cocoa Frosties, Rice Krispies and Coco Crunchers; and Nestlé Shredded Wheat;
- Multipacks of Walkers Squares, French Fries and Quavers crisps; multipacks of Hula Hoops and McCoys crisps; multipacks of KP Lunch Munch crisps;
- Pot Noodles;
- Multipacks of one-litre cartons of pure orange juice, promoted with a 'buy one, get one free' offer.

'5 A Day' promotions

Surveyors noted that '5 A Day' promotions of fruit and vegetables were relatively low-key in most stores. Where there were large fruit and vegetable displays, surveyors reported that these were colourful and attractive, and some were supported by colourful shelf tags and posters – usually promoting fruit.

However, fruit and particularly vegetables were rarely supported by other materials such as posters or recipe cards. Nor were they promoted through special offers, such as 'buy one, get one free' promotions, although some displays promoted fruit as a good deal in terms of price. Some displays promoted seasonal soft fruit.

Our surveyors thought the Somerfield Magazine worthy of note in that it contained recipe ideas including vegetables and a vegetarian feature both with the '5 A Day' message integrated into each recipe (indicating the number of portions each recipe would provide).

Our surveyors also noted that Co-op Shopper bags (heavy duty grocery bags) had the '5 A Day' message on them, with full-colour pictures of fruits and vegetables showing what counts as a portion.

Products aimed at children

Our survey did not specifically look at foods designed for or marketed to children, but researchers were asked to look out for promotions aimed at children – especially those that were own-label.

They reported that:

- No '5 A Day' promotions in the fruit and vegetable sections appeared to be aimed specifically at children.
- There were plenty of 'lunchbox' products on special offer – mainly for proprietary brands of multi-packs of crisps, sweet biscuits and small bottles of soft drinks.
- Highly sweetened cereals – mainly proprietary brands – were promoted by means of cartoon characters and film tie-ins. Some surveyors commented that *Spider-Man*® tie-ins were particularly noticeable in several supermarkets – linked to 'less healthy' foods. Some stores also had dump-bins or special stands devoted to confectionery branded with *Shrek*® imagery (a recent children's film release).
- Lots of proprietary brands of confectionery, snacks and soft drinks carried football imagery linked to the Euro 2004 football tournament, especially snacks, with some own-label products also targeted in this way.
- Products in the cereals category, and some in the yogurt category, were marketed for children with 'parent-friendly' information, such as 'rich in calcium' or 'suitable for lunchboxes'. Some surveyors noted that such information was associated with products containing a lot of sugar.

4 Customer information and advice

We generally found very poor availability and quality of nutrition information, interpretation and advice offered in-store by supermarket. Our indicator for this section is in two parts – scores out of five for information on diet and health offered in-store through leaflets and a possible further five points for the quality of information provided by staff at customer service desks.

Staff at Waitrose were the only retailer that could correctly provide information and interpretation on salt from food labels, while only Waitrose, M&S and Sainsbury's had information leaflets on diet and health available in the stores we surveyed.

Overall we have given retailers the scores as shown in the chart opposite.

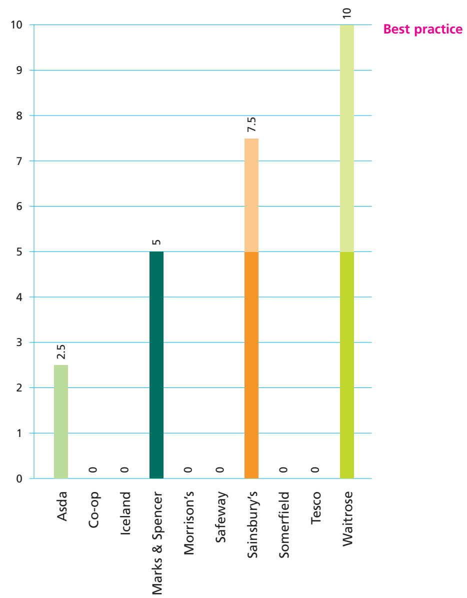
Leaflets on diet and health available in-store

Only the M&S, Sainsbury's and Waitrose stores in our survey carried leaflets specifically aimed at giving information on diet and health.

Information and advice available from retailers' in-store customer advice desks

We were disappointed by the general lack of in-store information and advice on nutrition and healthy eating we found. We accept that our experiences might have been different in different stores but our findings nonetheless indicate that this is an area where companies need to focus more attention. We did not include 'helplines' and company websites in our survey though we recognise that these can be valuable sources of information for some consumers. However, we do not consider that these can be a substitute for good information being available – and trained staff on hand – in-store.

The charts directly opposite shows the results of our survey of leaflets and in-store customer advice desks.



Overall retailers' scores for in-store information and advice

Leaflets
Information desk

	Leaflet information	Score
Asda	None found	0
Co-op	None found	0
Iceland	None found	0
Marks & Spencer	Boxed folder – 'Eat well, feel great' containing information on nutrition and health. Our surveyors commented: 'very thorough, with lots of unbranded information about diet and health, physical exercise and healthy weight maintenance, and contact details for independent organisations'.	5
Morrisons	None found	0
Safeway	None found	0
Sainsbury's	Several 4-6 page leaflets on diet and health: 'Get back into shape with carbohydrates', 'Food for the school years', 'Diabetes: a happy balance'; 'Putting healthy eating into practice', 'Looking after your heart'.	5
Somerfield	None found	0
Tesco	None found	0
Waitrose	Six page booklet on healthy eating giving basic information on the food pyramid, Guideline Daily Amounts and how to read food labels.	5

Leaflets on diet and health in-store

	Information on salt content	Interpretation	Score
Asda	Correct ✓	Unable to provide	2.5
Co-op	Access to advice unavailable	Unable to provide	0
Iceland	Unable to provide	Unable to provide	0
Marks & Spencer	Unable to provide	Unable to provide	0
Morrisons	Unable to provide	Unable to provide	0
Safeway	Incorrect ✗	Unable to provide	0
Sainsbury's	Correct ✓	Unable to provide	2.5
Somerfield	Unable to provide	Unable to provide	0
Tesco	Unable to provide	Unable to provide	0
Waitrose	Correct ✓	Provided ✓	5

Information and advice from in-store customer advice desk on salt content

Commentary

When asked how much salt the canned tomato soup contained:

- Staff in Asda, Sainsbury's and Waitrose gave correct information about the salt content of the soup, interpreting information provided on the label.
- Staff in Safeway gave incorrect information about the salt content of the soup.
- Staff in Iceland, M&S, Morrisons and Somerfield were not able to give any information about the salt content of the soup.

In the Co-op, customer advice staff were busy selling National Lottery tickets and the queue was too long for our researcher to be able to reasonably access them.

When asked to relate the salt content of the soup to dietary guidelines:

- Staff in Waitrose were the only supermarket representatives who were able to interpret the salt content, with reasonable confidence, in relation to dietary guidelines for adults and children.
- Where staff in the remaining stores were not able to interpret the salt content in relation to dietary guidelines, only Asda, Iceland, Morrisons and Tesco suggested that the surveyor contact a helpline (either the supermarket's own, or a helpline operated by a manufacturer). In the case of Asda, an enquiry was placed with head office, which had not been answered one month after the request was submitted.
- In the case of Somerfield, the surveyor was advised that Somerfield had no helpline, so it was not possible to get any information about either the salt content of the soup, nor how to relate this to dietary guidelines.

Taking it forward

Many of the retailers in our survey – particularly those that scored higher on our Health Responsibility Index – have successfully introduced, or are working towards, initiatives to support healthier eating. On the basis of our limited brand comparisons, we suggest that the majority of retailers have made more progress on nutrition labelling and salt reduction than many leading brand food manufacturers.

But the scale of the public health challenge on diet and nutrition should not be underestimated, particularly for poorer and other disadvantaged consumers. All retailers need to build on the leadership that some have shown and demonstrate greater commitment to encouraging and supporting healthier diets for all their customers. Clearly some of the policies that companies informed us of (see appendix 1) are aspirational rather than achieved. Others would be strengthened by communicating clearer targets and timescales. We also found some discrepancies between companies' stated policies and what we found in practice.

Health for all

Our findings clearly show that consumers' choice of supermarket can affect their chances of eating a healthy diet. Of particular concern, therefore, is our finding that those retailers that scored higher in our Health Responsibility Index were largely the retailers that tend to have a greater proportion of more affluent customers while, for those that rated less well, the reverse is true. The only company to buck this trend in any significant way is the Co-op. Social class D and E customers comprise 39 per cent of its core customers – only Iceland has more, at 50 per cent – yet the Co-op scored third in our Health Responsibility Index.

Statistics on diet and health reveal startling inequalities. For example, poorer women are twice as likely to be obese as those from higher social classes[14]. Not only do lower-income consumers suffer the worst diet-related ill-health, they also face the greatest barriers to healthier eating.

Our findings add weight to the argument that the policies and practices of the food retailing industry are contributing to diet-related health inequalities. Retailers who primarily serve lower-income consumers need to do most to help their customers make healthier choices; our research indicates the opposite is happening.

We urge all companies – particularly Iceland, Somerfield, Morrisons, Tesco and Asda – to prioritise the added challenges of tackling health inequalities through their policies and practices. We would especially encourage Iceland – where half its customers are from poorer communities – to boost the availability of fresh fruit and vegetables. We can also see the value in extending our indicators work on nutrition content and nutrition labelling to retailers' 'value' lines, and to compare pricing and in-store promotional strategies in retailers' stores in lower-income areas with those in higher-income areas. For example, while more upmarket retailers may give greater emphasis to fresh fruit and vegetables, do they also charge more?

Our indicators measuring 'less healthy' snacks at the checkout, shelf space for 'less healthy' snack foods vs. fruit, and the qualitative commentary on other common price promotion strategies graphically illustrate the ways customers are encouraged to purchase 'less healthy' foods. The NCC's qualitative research with low-income consumers, published in *Future of Farming and Food*[15], found that many people would seek out 'buy-one-get-one-free' offers, often visiting several supermarkets.

It is easy for retailers to argue that they provide what their customers want to buy. But in recommending that supermarkets should adopt strategies that positively support healthy eating, the influential Health Select Committee Inquiry into Obesity challenged the view that 'their duty to their customers goes no further than simply providing the range of foods which they want to buy'[16]. We strongly endorse the Select Committee's view that retailers should 'phase out price promotions that favour 'less healthy' foods and stop all forms of product placement which gives undue emphasis to 'less healthy' foods, in particular placement of confectionery and snacks at supermarket checkouts'.

We welcome the Co-op policy to ensure that all promotions include a proportion (25-30 per cent) of healthy products. No other retailer told us of similar policies. We recommend all retailers adopt targets for healthier food promotions.

Corporate social responsibility

To date, health and nutrition has not featured prominently on most food companies' corporate social responsibility (CSR) agendas. For example, none of Tesco's twenty-seven Corporate Responsibility Key Performance Indicator targets for 2004/05, covering the company's impacts on society, the economy and the environment, refer to targets in support of nutrition and public health, though that is not to say that Tesco does not have policies relating to nutrition and health. We summarise the policies that companies communicated to us in Appendix 1.

The government's white paper on Public Health places responsibilities on all players, including food companies, to implement policies and practices that support and encourage healthier eating for all. For retailers, and all food companies, we recommend that policies and targets on 'health and nutrition' should now be a central plank of company CSR target setting and reporting.

The value of the NCC's Health Indicators

Our research has facilitated progress to nutrition and public health goals by developing a set of Health Indicators that can be used to set targets and benchmark retailers' performance in four key areas: nutritional content of foods; nutrition labelling; in-store promotion; and availability of information and advice.

We have demonstrated how our Health Responsibility Index allows companies, their customers, government and others to measure, transparently, retailers' performance and, if measured over time, the progress companies are making. The Index acknowledges and rewards

good practice while highlighting poorer practices. In this way, the highly competitive nature of the UK food retailing sector can be harnessed to public health 'good' with retailers using their significant influence to support of the health of the nation as we believe many have started to do.

For example the British Retail Consortium's *Policy Framework for Salt Minimisation* aims to support Government's salt reduction strategy. Across the food industry more broadly, the Food and Drink Federation's recently published *Food and Health Manifesto* includes a commitment to reducing levels of sugar, fat and salt in processed foods and more informative nutrition labelling.

Our research findings provide a benchmark by which companies can be audited. We recommend that the DoH and FSA adopt and develop our Health Indicators and establish annual surveys to monitor progress. Our indicators have focused on nutrition and health but we see value in placing these within a broader range of sustainability indicators – as 'Race to the Top' sought to achieve.

One way to achieve this would be for our Health Responsibility Index to be incorporated into Defra's Food Industry Sustainability Strategy.

The potential value of the NCC's Health Indicators was illustrated in September 2004 when the government launched its salt awareness campaign[17]. Much of the ensuing media coverage focused on whether supermarkets were making sufficient commitment and progress towards government targets for salt reduction in their own-label processed foods[18]. Those retailers and food companies who commented considered they were making good progress; other commentators, including government ministers, criticised the industry for doing too little or doing it too slowly. This illustrates the urgent need for a system that can independently benchmark companies' progress – relative to each other and to targets. This is exactly what we have begun to develop – not just for salt reduction but across a range of targets. We can now show, on the basis of our findings, that all companies have much more progress to make to achieve FSA targets for salt reduction.

Developing nutrient targets

Our Health Indicators require 'targets' against which to measure performance. For nutrient content we have used the FSA salt model 'target average' levels for product categories as our target. However, a lack of such targets for fat, saturated fat and sugar has hampered our development of indicators in respect of other nutrients.

We welcome the work of the FSA to reduce average salt intake by ten per cent by 2005/06, equating to a 1g per day reduction. In the long term, the target is to reduce average population intake by a third over the next five years to bring intakes down to the target average for adults of 6g per day. We also welcome the FSA's work to monitor progress on salt reduction. If such voluntary measures to achieve targets fail, we endorse the Health Select Committee recommendation that government must be prepared to introduce tougher measures.

We recommend that similar targets and timescales be developed for fat, saturated fat and sugar as proposed in the government public health white paper.

Nutrition labelling

We recommend the FSA should develop guidance for 'best practice' in nutrition labelling, conduct monitoring and to work to enshrine this within legislation. The scope of this should include:

- 'full 8' nutrition information;
- sodium translated into salt per serving;
- use of GDAs;
- high/medium/low interpretative information within nutrition labelling panel; and
- use of front-of-pack 'traffic light' and 'signposting' of key nutrients or of 'healthier' and 'less healthy' foods.

Much work is currently ongoing to look at ways nutrition labelling can help consumers make healthier choices. Our recommendation above seeks to establish 'best practice' more widely across the industry. In particular, the NCC supports the development of nutrient profiling as a basis for front of pack interpretative labelling such as 'traffic light' declarations[19]. We welcome the FSA's work to take this forward and the government support that this gets in the white paper on Public Health[20]. The majority of the food industry, however, favours the use of GDAs. While these can help draw attention to the quantity of particular nutrients, they still require further interpretation by consumers to provide meaningful information. Therefore, their value is limited.

The Co-op introduced high/medium/low interpretative 'signposting' on its nutrition panels in 1986 and is still the only company to do so. In September 2004 the company announced that it will trial the introduction of shelf tags on its stocks of major branded products to indicate whether they are high, medium or low in fat, salt and calories in order to help support customers to make healthier choices beyond its own label range of products. Tesco has announced plans to trial a front of pack 'traffic light' scheme, though this is likely to be different from that which the FSA will propose, indicating the need for industry wide consistency.

The way forward:

We shall be discussing our approach with the FSA, the DoH and with retailers themselves. We also recognise there is undoubtedly room to develop and refine our approach, and we welcome the views of others.

Contact Sue Dibb – s.dibb@ncc.org.uk

[14] Chief Medical Officer's Report, 2002.

[15] Summarised in *Feeding into Food Policy, a submission to the Policy Commission on the Future of Farming and Food on the views of low income consumers*, NCC, 2001.

[16] House of Commons Health Select Committee report on Obesity, 2004.

[17] Government's Salt Awareness Campaign was launched September 2004. See www.salt.gov.uk.

[18] *Supermarkets defy minister over safer food*, Independent, 13 September 2004.

[19] *Traffic lights for food?*, NCC 2004.

[20] Choosing Health; making healthier choices easier, November 2004.

Appendix 1 Retailers' company policies

We asked companies for details of any policies relevant to the four areas covered by our investigation. All companies responded, except Morrisons (now including Safeway). Information we were sent on policies directly relevant to our key areas of interest is summarised here.

From the information provided, we made some observations.

- Nutrition content: All referred to salt reduction programmes though only Asda, Co-op, Iceland, Somerfield and Waitrose included mention of reduction targets and few included timescales for achievement of targets. Only the Co-op and Iceland made reference to intending to meet the FSA salt reduction targets. Asda, Co-op, Iceland and Waitrose also indicated they were also reviewing fat and sugar levels in their own label foods.

- Nutrition labelling: All companies gave us information on their nutrition labelling policies though we found some discrepancies between what some companies told us and what our survey found, particularly Tesco. The company told us that all Tesco products translation sodium content into salt, provide GDA's and front of pack statements on Calories, fat and salt. We found that only some of the products we surveyed carried this information, not all. We surmise that Tesco's policy is aspirational rather than yet fully achieved.

- In-store promotions: Most of the companies told us that they had supported '5 A Day' promotions but otherwise we received less information on company policies in respect of in-store promotions than for nutrition content and labelling. The Co-op was the only company to tell us that it ensures that all promotions include a proportion (25-30 percent) of healthy products. Sainsbury's and Tesco told us that their large stores did not include sweets at checkouts. While we found that both scored quite highly on this Health Indicator in our in-store survey, we still found that four of the 40 checkouts in the Tesco store did carry sweets and two out of 26 checkouts in Sainsbury's, while not carrying sweets, did include soft drinks.

- Information and advice: Asda, Co-op, Sainsbury's and Waitrose told us of their 'healthy eating' leaflets, examples of which we found in our in-store survey – except for Asda and the Co-op. Only Waitrose told us it operated a Nutrition Advice Service to branches and customers. Waitrose was the only company to get full marks for our information and advice Health Indicator.

  Asda told us that by the end of 2005, 50,000 of its staff will have basic nutrition knowledge.

Asda

Nutrition / salt

- 'Food Pledge' Programme on salt started in 1998. 12% of salt removed from 3000 foods. In 2002, included reducing fat, sugar, additives and allergens. 2004 programme 'up-weighted'.
- In May 2004 launched new fat, salt and sugar policy with maximum values (British Retail Consortium salt values are included) and lower target values for all Asda Brand product categories.Priorities for delivery in early 2005 include sandwiches, soups, all 'Smart Price' and 'Good For You!' products plus any category launches already planned.

Nutrition labelling / information

- Company policy to declare 'full 8' nutrition information per 100g and per serving where space permits. An additional highlighted box provides fat, Calories and salt per serving.
- Provide GDAs for Calories, fat, saturated fat and salt on selected packs, on website and in literature.
- 'Good For You!' healthy-eating brand carries front of pack roundels showing Calories, fat and saturated fat per serving and the % fat content. These are popular with customers and company is considering inclusion on other Asda ranges.
- Assessing consumer demand for health improvement icons such as 'now 10% less fat' or '20% less salt' to support fat, salt and sugar reduction programme.

In-store promotions

- '5 A Day': First company to introduce DoH '5 A Day' logo on fruit and veg packs and rolling out to frozen and some fresh fruit and veg. Worked with NHS to trial information 'barkers'.

Information and advice

- Asda says: 'We have provided customers with supporting nutrition advice and information for many years'. The company's range of healthy eating leaflets include 'Healthy Living', 'Diabetes', '5 A Day' and 'Allergens and Intolerances'.
- It runs a website, 'Healthy Living for Everyone' including fact sheets, information on children's diets, diet plans, healthy recipes, links to NHS Direct and health related charities.
- Operates store tour guides for the public and health professionals. Has an expanding database of currently around 200 health professionals working with the company locally.
- Health Exhibition Stand used at events for health professionals and public.
- 'Big Healthy Eat' school curriculum education programme – 2004-6 will focus on healthy eating.
- Currently investigating other health promotion and education opportunities to be launched in 2005.
- Nutrition education incorporated into staff training programme. By end of 2005, 50,000 staff will have basic nutrition and allergy knowledge.

Co-op

Nutrition / salt

- Progressive reductions in fat and salt on-going since 1995. Now aiming for 20% reduction in both fat and salt – with FSA salt values as target on product category basis.
- In parallel looking to reduce the level of sugar in sugary products. Labels for own-label high sugar products such as sweets and soft drinks include dental health warnings.
- Co-op Healthy Living brand includes maximum 3% fat for ready meals.

Nutrition labelling / information

- 'Full 8' nutrition information per 100g and per serving on all Co-op Brands.
- High, medium or low descriptors for each nutrient.
- Salt declared as well as sodium.
- Front-of-pack flashes showing Calories, fat and salt per serving – across whole Co-op Brand range.
- GDAs for Calories, fat and salt.
- Relevant foods carry 'Eat More' front-of-pack roundel to encourage consumption of starchy carbohydrates (bread, pasta and potatoes) and oily fish.

In-store promotions

- Ensure all promotions include a proportion (25-30%) of healthy products.
- Commitment to provide selection of fresh fruit and vegetables in all stores – including small stores.
- Regularly include fresh fruit and veg in advertising.
- Use '5 A Day' front-of-pack logo with number of portions per serving to encourage consumption of fruit and vegetables.

Information and advice

- Have two booklets – on labelling and healthly eating with supporting information on website. Provide access to advice though a freephone/freepost Careline.
- Stores display a range of customer information to support '5 A Day'. Also used on own-label packaging, within promotional material, on re-usable carrier bags and on website.
- Does not promote or advertise products high in fat, sugar or salt to children or use other promotional techniques including cartoon characters or free gifts.
- Supports a number of community-based nutrition and education initiatives.

Iceland

Nutrition / salt

- Sodium reduction programme over three years specifying maximum target levels based on Scientific Advisory Committee on Nutrition (2003) recommendations and FSA salt reduction model.

Nutrition labelling / information

- All own-label products includes 'full 8' nutrition information per 100g and per serving. Also declare salt values. Introducing GDA panels on Iceland 'Good Choice' range in early 2005.

In-store promotions

- Offer a variety of in-store promotions across different dietary food groups.
- own-label frozen vegetables will feature '5 A Day' logo and portion indicator from October 2004. During launch period operating a 20% price reduction on frozen vegetables.

Information and advice

- Includes regular 'healthy eating' features in in-store magazine, on point-of-sale material and company website.

M&S

Nutrition / salt

- 'Salt reduction remains an important part of our ongoing relationship with customers... we intend to minimise salt where possible'. Applies to all M&S brand ranges and all new product developments.

Nutrition labelling / information

- 'Generally provide' full nutrition labelling. Include salt information.
- Provides GDAs for Calories, fat and salt. Introducing '5 A Day' to GDA information supported by front-of-pack icon.

In-store promotions

- Piloted fruit at checkouts but sales disappointing.

Information and advice

- Store staff can assist customers with queries and advice.

Morrisons

We did not receive a response from Morrisons despite a number of follow up calls to our letter of request. The company told us it was busy with its takeover of Safeway.

Safeway

We did not receive a response from Safeway due to the takeover of the company by Morrisons.

Sainsbury's

Nutrition / salt
- Healthy Eating initiative launched in 1994.
- 2003: three year commitment to reduce salt in five categories of own-label foods (pizzas, ready meals, soups, sandwiches and breakfast cereals).
- Also addressing salt content in quiches, baked beans, bread and cook-in sauces.

Nutrition labelling / information
- 'Full 8' nutrition labelling per 100g and per serving on all products 'wherever possible'. Includes salt information on nutrition panel and GDAs for Calories, fat and salt on own-label foods.

In-store promotions
- Currently working on policy in this area.
- Checkouts (except at Local and Central store formats) will not include sweets except two weeks before Easter and four weeks before Christmas when seasonal products at checkouts may include chocolate.

Information and advice
- Provide various customer 'Healthy Living at Sainsbury's' leaflets in-store.
- Customer website has extensive information on nutrition and healthy eating initiatives.
- *Sainsbury's Magazine* includes healthy living features.
- Experience of working in partnership with health professionals, health charities and commercial partners to offer a range of 'healthy eating' store tours.
- In addition have food advisers to help consumers make healthier choices in-store.

Somerfield

Nutrition / salt
- Somerfield has a five-year programme to reduce the salt content in all its own label products which includes a 10% cut by the end of the first year. This has already been achieved for some pizzas, ready meals and snacks.
- Somerfields 'Good Intentions' products contain 5% or less fat or have 25% less fat than the standard equivalent. The company is currently developing new nutritional criteria for Good Intentions.

Nutrition labelling / information
- Nutritional information is generally the 'full 8' except the 'big 4' where lack of space.
- Majority of products have salt equivalent figures.

In-store promotions
- Frequently promote specific ranges such as 'So Good' or 'Good Intentions' with a 20% price reduction. Also run promotions on standard products throughout the entire range including fresh meat or fresh produce.
- Has previously promoted '5 A Day'.

Information and advice
- Free Somerfield magazine features articles such as salt and five-a-day.
- Website features product and food information.

Tesco

Nutrition / salt
- Tesco has a salt minimisation programme being introduced in a stepped approach, including baked beans, breads, breakfast cereals, quiches, pizzas, ready meals, sandwiches, soups and cook-in sauces. This aims to decrease salt in these foods to the minimum possible level.
- Tesco's Health Living range is formulated to be less than 3% fat or half the fat and at least 10% less sodium of a standard equivalent.

Nutrition labelling / information
- All Tesco products: provide nutrition labelling; translate sodium content into salt per serving; provide GDAs for Calories, fat and salt for men and women; front-of-pack statements giving Calories, fat and salt per serving.

In-store promotions
- None of Tesco's advertising is aimed at children.
- Tesco was the first supermarket to remove sweets from checkouts in superstores.
- Actively encourages healthy alternatives for children. 'Barbie apples' were a great success last year. Currently researching similar promotions for boys to encourage children to eat more fruit.

Information and advice
No information provided.

Waitrose

Nutrition / salt
- Waitrose Nutrition Policy includes provision of specific targeted guidance on fat, sugar and salt to improve nutritient profile of processed products.

Nutrition labelling / information
- Provides 'full 8' nutrition labelling and salt declaration.
- Provides GDAs for Calories, fat and salt.

In-store promotions
No information provided.

Information and advice
- Committed to providing a Nutrition Advice Service to branches and customers. Includes leaflets and web-based nutrition and advice.

Appendix 2 Products surveyed

The table provides details of all own-label 'standard', 'healthier' and leading brand products that we surveyed. For products included in our sodium survey, the sodium content (per 100g as declared on the label, June 2004) is shown in brackets. Where we have scored products (out of 10) this figure is also provided. For products that we examined for declared fat, saturated fat and sugar content, this data is provided at http://www.ncc.org.uk/food/RRfatsugar.pdf

	Asda	Asda 'healthier'	Co-op	Co-op 'healthier'
Baked beans	Baked beans in tomato sauce (0.5g / 4.0)	Baked beans in reduced sugar tomato sauce (0.2g)	Baked Beans in Tomato Sauce (0.4g / 8.0)	Healthy Living Baked Beans in Reduced Sugar and Salt Tomato Sauce (0.3g)
Canned tomato soup	Cream of Tomato Soup (0.4g / 3.33)	Good For You! Tomato & basil soup (0.3g)	Cream of Tomato Soup (0.4g / 3.33)	Healthy Living Spicy Tomato & Vegetable Soup (0.2g)
Cornflakes	Cornflakes (0.9g / 1.4)	n/f	Cornflakes (0.9g / 1.4)	n/f
Frosted cereal	Frosted Flakes	n/f	Frosted Flakes	n/f
Pasta sauce	Tomato and Garlic Pasta Sauce (0.3g / 9.1)	n/f	Pasta Sauce Tomato and Herb (0.5g / 5.4)	Healthy Living Pasta Sauce Tomato & Herb (0.5g)
Pizza	Italian Stonebaked Cherry Tomato, Red Pesto and Mozzarella Pizza (0.5g / 3.3)	Good For You! Margherita stonebaked pizza (0.3g)	Thin and Crispy Cheese and Tomato Pizza (0.5g / 3.33)	n/f
Pork sausages	8 Thick Pork Sausages (0.8g / 0.0)	Less than 5% fat 8 Pork Sausages (0.7g)	Pork 8 thin sausages (0.5g / 10.0)	Healthy Living Low Fat Sausage (0.3g)
Salt and vinegar crisps	Salt and Vinegar Crisps (1.1g / 2.7)	n/f	Salt and Vinegar Flavour Crisps 6 pack (0.9g / 5.3)	n/f
Strawberry yogurt	Low fat bio yogurt strawberry	Good For You! Strawberry yogurt	Low Fat Strawberry Yogurt	n/f
Sunflower/vegetable fat spread	Sunflower spread (0.7g / 2.5)	Sunflower light spread (0.7g)	Sunflower spread (0.5g / 7.5)	Olive Reduced Fat Spread (0.6g)
Tomato ketchup	Tomato Ketchup (1.0g / 5.0)	n/f	Tomato Ketchup (0.7g / 8.8)	n/f
White sliced bread	Square Cut Medium White (0.4g / 6.7)	Medium Cut Wholesome White (0.5g)	White Sliced Bread Medium (0.4g / 6.7)	n/f

n/f not found in the store surveyed

Iceland	Iceland 'healthier'	Marks & Spencer	Marks & Spencer 'healthier'	Morrisons	Morrisons 'healthier'
Great value! Baked beans in tomato sauce (0.4g / 8.0)	n/f	Baked Beans in a rich tomato sauce (0.5g / 4.0)	n/f	Baked beans (0.6g / 0.0)	Better for You Reduced Sugar and Salt Baked Beans (0.3g)
n/f	n/f	Tomato and Herb Soup (0.31g / 6.33)	n/f	Cream of Tomato Soup (0.5g / 0.0)	Better for You spicy tomato and lentil soup (0.3g)
n/f	n/f	Corn Flakes (0.9g / 1.4)	n/f	Corn Flakes (0.9g / 1.4)	n/f
n/f	n/f	Frosted Flakes	n/f	n/f	n/f
Tomato and Herb Italian style sauce with onion and garlic (0.5g / 5.4)	n/f	Tomato and Herb pour over pasta sauce (0.79g / 0.0)	n/f	Pasta sauce: original with tomatoes and onions (0.4g / 7.2)	Better for You Pasta Sauce: original with tomatoes and onions (0.4g)
Deep and Crispy Cheesefeast takeaway pizza (0.5g / 3.3)	n/f	Cheese and Tomato Pizza (0.53g / 2.3)	n/f	Cheese and Tomato thin (sodium content not declared)	n/f
n/f	n/f	Pork Sausages (0.7g / 4.0)	Extra Lean Pork Sausages (0.92g)	8 skinless pork sausages (sodium content not declared)	8 Better for You extra lean pork sausages (0.4g)
n/f	n/f	Crinkle Crisps Salt and Vinegar flavour (1.0g / 4.0)	n/f	Salt and vinegar flavour crisps (1.1g / 2.7)	n/f
n/f	n/f	Thick and Creamy Strawberry Yogurt	Low Fat Extremely Fruity Strawberry Creamy Bio Yogurt	Low fat strawberry yogurt (sodium content not declared)	Better for You strawberry virtually fat free bio yogurt
n/f	n/f	Dairy Free Sunflower Spread (0.6g / 5.0)	Low Fat Dairy Free Sunflower Spread (0.6g)	Sunflower spread (0.7g / 2.5)	Better for You sunflower light spread (0.7g)
Tomato Ketchup (1.1g / 3.8)	n/f	Tomato Sauce (1.0g / 5.0)	n/f	Tomato Ketchup (1.4g / 0.0)	Better for You Tomato Ketchup (0.5g)
White Medium (0.4g / 6.7)	n/f	Premium White (0.47g / 2.0)	Extra Lean Pork Sausages (0.92g)	Farmer's Boy white bread thick sliced (0.5g / 0.0)	Better for You fibre white bread (0.28g)

Safeway	Safeway 'healthier'	Sainsbury's	Sainsbury's 'healthier'	Somerfield	Somerfield 'healthier'
Baked Beans (0.5g / 4.0)	Reduced Salt and Sugar Baked Beans (0.3g)	Baked Beans in Tomato Sauce (0.5g / 4.0)	Reduced salt & sugar Baked Beans in Tomato Sauce (0.3g)	Baked beans in tomato sauce (0.6g / 0.0)	Good Intentions reduced sugar and salt baked beans (0.4g)
Safeway Cream of Tomato Soup (0.3g / 6.67)	Safeway Tomato Pepper and Basil Soup (0.1g)	Cream of Tomato Soup (0.5g / 0.0)	Be Good to Yourself Spicy Tomato & Lentil Soup (0.3g)	Cream of Tomato Soup (0.5g / 0.0)	n/f
Corn Flakes (1.0g / 0.0)	n/f	Corn Flakes (0.9g / 1.4)	n/f	Corn Flakes (0.9g / 1.4)	n/f
Frosted Flakes	n/f	Frosted Flakes	n/f	Frosted Flakes	n/f
Italian Sauce Tomato and Herb (0.2g / 10)	Eat Smart Mediterranean Vegetable Sauce for Pasta (0.2g)	Italian Tomato and Herb Sauce (0.4g / 7.2)	Be Good To Yourself Italian Tomato & Herb Sauce (0.32g)	Italian Pasta Sauce with Tomato and Herbs (0.5g / 5.4)	n/f
Thin and Crispy Pizza Cheese and Tomato (0.6g / 0.0)	n/f	Cheese and Tomato Thin and Crispy Pizza (0.4g / 6.7)	Be Good To Yourself Margherita Pizza (0.3g)	n/f	n/f
8 Thick Pork Sausages (0.7g / 4.0)	Butcher's Choice 8 Pork Sausages (0.8g)	Butcher's Choice 8 Lincolnshire Sausages (0.7g / 4.0)	Be Good to Yourself 8 Extra Lean Pork Sausages (0.6g)	Butcher's selection pork sausages (0.7g / 4.0)	Good Intentions pork sausages (0.9g)
n/f	n/f	Salt and Vinegar Flavour Crisps (1.1g / 2.7)	Lower Fat Crisps (1.2g)	n/f	n/f
Safeway Thick and Creamy strawberry yogurts	Strawberry Low Fat Yogurt	Strawberry selection low fat yogurt (low fat strawberry yogurt)	Be Good to Yourself fat free 4 yogurts	French set yogurt – strawberry	Low Fat Deliciously Fruity Yogurts
Sunflower spread (0.6g / 5.0)	Sunflower light (0.7g)	Olive spread (0.6g / 5.0)	Be Good to Yourself Olive Spread (0.7g)	Supasoft margarine (0.8g / 0.0)	Olive Reduced fat spread (0.6g)
Tomato Ketchup (1.0g / 5.0)	Reduced Sugar and Salt Tomato Ketchup (0.5g)	Tomato Ketchup (0.9g / 6.3)	Reduced sugar & salt Tomato Ketchup (0.6g)	Tomato Ketchup (1.1g / 3.8)	n/f
White Family Loaf Medium Sliced (0.4g / 6.7)	n/f	Medium Sliced White Loaf (0.5g / 0.0)	n/f	White Bread medium sliced (0.4g / 6.7)	n/f

n/f not found in the store surveyed

The first figure shown in brackets is the sodium content given as grams per 100g, as declared on the label
The second figure shown in brackets is the NCC score as calculated on page 22

Tesco	**Tesco 'healthier'**	**Waitrose**	**Waitrose 'healthier'**	**Leading Brands**
Beans in tomato sauce (0.5g / 4.0)	Healthy Eating Tesco Baked Beans (0.3g)	Baked Beans in Tomato Sauce (0.4g / 8.0)	Reduced Sugar & Salt Baked Beans in Tomato Sauce (0.2g)	Heinz Baked Beans (0.4g)
Cream of tomato soup (0.4g / 3.33)	Tomato and Orange Soup (0.3g)	Tomato and Basil Soup (0.27g / 7.67)	Perfectly Balanced Tomato and Red Pepper Soup (0.25g)	Heinz Tomato Soup (0.4g)
Corn Flakes (0.9g / 1.4)	n/f	Corn Flakes (0.9g / 1.4)	n/f	Kellogg's Cornflakes (0.95g)
n/f	n/f	Frosted Flakes	n/f	Kellogg's Frosties
Original pasta sauce (0.4g / 7.2)	Healthy Eating Original Pasta Sauce (0.3g)	Italian Pasta Sauce (0.44g / 6.5)	Perfectly Balanced Original Pasta Sauce (0.2g)	Dolmio and Knorr Ragu (0.45g)
Cheese Pizza (0.6g / 0.0)	Healthy Living Vegetable Pizza (0.2g)	Thin and Crispy Mozzarella, Tomato and Basil Pizza (0.6g / 0.0)	Perfectly Balanced Italian Cherry Tomato and Mozzarella Stonebaked Pizza (0.3g)	Goodfella's (0.4g)
8 thick pork sausages (0.7g / 4.0)	Healthy Living British Butcher's choice (0.6g)	Waitrose British Pork Lightly Seasoned Sausages (0.72g / 3.2)	Waitrose 8 Extra Lean Premium Pork Sausages (0.5g)	Wall's (0.7g)
Select Salt and Vinegar Crisps (1.3g / 0.0)	n/f	n/f	n/f	Walkers (1.2g)
Low fat yogurt	Healthy Living Light Strawberry Yogurt	Seriously Fruity Low Fat Yogurts (strawberry yogurt in selection pack)	Perfectly Balanced Live Bio Yogurt Strawberry	Müller Light Strawberry Virtually Fat Free Yogurt
Sunflower Spread (0.6g / 5.0)	Healthy Living Sunflower Spread (0.6g)	Sunflower Spread (0.8g / 0.0)	Olive Spread (0.56g)	Flora Original (0.6g)
Tomato Ketchup (1.2g / 2.5)	Reduced Sugar & Salt Tomato Ketchup (1.2g)	Tomato Ketchup (1.12g / 3.5)	Reduced Sugar and Salt Tomato Ketchup (0.47g)	Heinz Tomato Ketchup (1.2g)
White bread thick sliced (0.4g / 6.7)	Wholesome White Medium Sliced Premium (0.5g)	Waitrose Medium Sliced White Bread (0.39g / 7.3)	n/f	Hovis (0.6g) Kingsmill (0.5g)

The diet and health challenge

Adult obesity has almost quadrupled in the last 25 years. Over half of the population in England is currently overweight or obese with nearly a quarter obese[21]. 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 people being overweight and obesity is estimated to be up to £7.4 billion[22].

Weight problems are also increasing alarmingly among children – obesity almost doubled in two- to four-year-olds between 1989 and 1998[23]. Obesity, as with most public health problems, mirrors other health inequalities. Poorer women are twice as likely to be obese as those from higher social classes[24].

The government currently has no realistic targets to cut obesity. Targets set over a decade ago aimed to reduce obesity to six per cent of men and eight per cent of women by 2010[25]. Since then, obesity rates have risen dramatically.

Diet and physical exercise are both important factors in this increase. Increased consumption of snack, sweetened fizzy drinks, and energy-dense fast food together with larger portion sizes of fast food and snacks have all contributed as have lower levels of physical activity[26]. Our increased consumption of processed foods has also contributed toward increasing salt intakes. Current estimates suggest that average salt intakes are 11g and 8g a day in men and women respectively – well above the 7g and 5g a day maximum recommended by the Scientific Advisory Committee on Nutrition (SACN). Seventy-five per cent of the salt in our diets comes from processed foods. Eating too much salt can lead to higher blood pressures that increases the risk of coronary heart disease or stroke.

Nutritional priorities currently are[27]:

- Increase average consumption of a variety of fruit and vegetables to at least five portions a day (currently 2.8 portions)
- Increase average intake of dietary fibre to 18g per day (currently 13.8g per day)
- Reduce average intake of salt to 6g a day (currently 9.5g)
- Reduce average intake of saturated fat to 11 per cent of food energy (currently 13.3 per cent)
- Maintain the current trend in reducing average intake of total fat to 35 per cent of food energy (currently at 35.3 per cent)
- Reduce the average intake of added sugar to 11 per cent of food energy (currently 12.7 per cent).

[21] Health Survey for England, 2002.

[22] House of Commons Health Committee, Obesity, HC23-1, 2004.

[23] The management of obesity and overweight: an analysis of reviews of diet, physical activity and behavioural approaches. Evidence briefing. C Mulvihill and R Quigley, Health Development Agency, 2003.

[24] Chief Medical Officer's Report, 2002.

[25] The Health of the Nation White Paper, Department of Health, 1992.

[26] Securing Good Health for the Whole Population, Final Report, Derek Wanless, 2004

[27] Department of Health (www.doh.gov.uk)

Other relevant NCC publications

Traffic lights for food? How nutrient profiling can help make healthy choices become easy choices, 2004.
Food promotions and children's diets: response to the Food Standards Agency consultation, 2004.
Responsible food advertising to children: NCC proposals to Ofcom, 2004.
Health Literacy: being able to make the most of health, 2004.
Nutrition and health claims on food, proposals to harmonise controls across the EU, briefing for MEPs, 2003.
Bamboozled, baffled and bombarded: consumers' views on voluntary food labelling, 2003.
Future of food and farming: reforming the Common Agricultural Policy in the interests of consumers, 2002.
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What NCC is doing on diet and health

The NCC is working to achieve better food and health policies for consumers. We are championing the concept of 'nutrient profiling' and have created a platform for industry, government and consumer groups to explore the first practical model to underpin 'traffic light' food labelling. Children are a particular focus and we are looking carefully at how nutrient profile information can be used to support more balanced diets. We support better controls on the marketing and advertising of foods to children and have explored how controls on 'unhealthy' food adverts could work in practice. We also support European legislative proposals to regulate the use of nutrition and health claims on foods.

Of particular concern are inequalities in diet and health. We are funding major research with Staffordshire Council Council to investigate food access issues within local communities. In Scotland, the Scottish Community Diet Project – hosted by our sister organisation, the Scottish Consumer Council - supports local communities tackling inequalities in diet and health.

Looking at health more broadly, we are pioneering health literacy – people's capacity to obtain, interpret and understand basic health information – in order to enhance their health.

About the National Consumer Council (NCC)

The NCC makes a practical difference to the lives of consumers around the UK, using its insight into consumer needs to advocate change. We work with public service providers, businesses and regulators, and our relationship with the Department of Trade and Industry - our main funder - gives us a strong connection within government. We conduct rigorous research and policy analysis to investigate key consumer issues, and use this to influence organisations and people that make change happen. Check **www.ncc.org.uk** for our latest news.

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