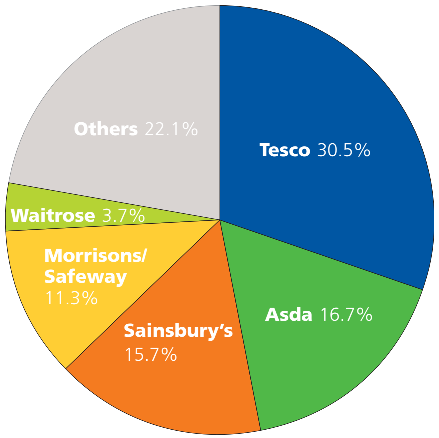
Healthy competition
Key findings



Supermarkets' share of the UK food market, August 2004
TNS Superpanel, quoted in *Evening Standard* 16 September 2005

Last year our innovative Health Responsibility Index put supermarkets under the spotlight on nutrition and health as never before[1]. Now, one year on, we have repeated the research to measure what has changed.

Our spot-check survey of the top nine UK supermarkets measures and compares company performance, tracks progress since 2004, highlights good practice, and identifies ways in which retailers can go further to support nutrition and public health goals.

Last year our survey generated considerable media interest and overnight achieved one of our objectives – to focus the attention of supermarkets on what more they could do to help their customers shop, cook and eat more healthily. As a result, several retailers told us they wanted to be this year's number one retailer for health. Supermarkets are now starting to compete not just on price, but on health. We are successfully using this fiercely competitive market to drive up standards for consumers.

The heat is on. A year ago, the government committed to tackle obesity and diet-related ill-health through action on diet and physical exercise[2]. Last year we revealed which companies are already delivering on commitments to healthier products and practices – but the challenge of a further 400,000 UK adults becoming obese year-on-year requires ongoing strategies and commitments.

This year, our survey has an increased focus on budget-conscious shoppers. We surveyed 'economy' own-brand foods and measured the 'health' balance of supermarkets' price promotions. Last year we concluded that retailers' practices were contributing to, or exacerbating, the inequalities that

[1] *Rating Retailers for Health*, NCC, 2004, www.ncc.org.uk/food/rating_retailers.pdf

[2] *Choosing Health: making healthier choices easier*, Department of Health, 2004

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 and translation of sodium content into salt equivalent.
- Use of Guideline Daily Amounts (GDAs) on nutrition labelling.
- Use of interpretative 'high/medium/low' or 'signpost' nutrition labelling.

3. In-store promotions

- 'Healthy' foods (fruit and vegetables) as a proportion of in-store price promotions.
- The presence of sweets and 'less healthy' snacks at the checkout.

4. Customer information and advice

- Information and advice on healthy eating available in-store through leaflets and magazines and via retailers' national telephone helplines.

exist between the diet and health of more affluent and less affluent consumers.

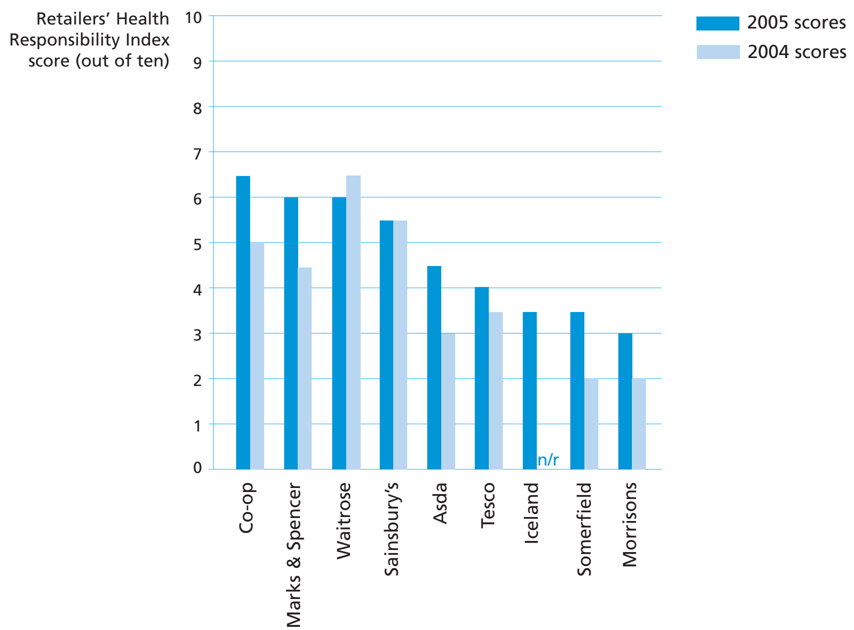
This year, as last year, we calculated that where you shop could add significantly to the salt in your diet, and that less healthy products and promotions are more often found in retailers with more low-income consumers.

In 2005, new government statistics have revealed shocking health inequalities[3]. This shows no improvement in fruit and vegetable consumption by the most disadvantaged groups and no significant narrowing of the fruit and vegetable consumption gap between rich and poor. Now, for the first time, we show how supermarkets could help turn the tide.

Our Health Responsibility Index was developed at a time of enormous change and competition in the food retail sector, with continuing concentration in the market: 2004 saw Safeway being bought out by Morrisons. This year, Tesco again announced record profits: they now take nearly one in every three pounds we spend on food. The company's share of the food retail market has grown to over 30 per cent – almost the size of Asda and Sainsbury's put together (see pie chart on page one).

Key findings

- Our Health Responsibility Index demonstrates that retailers are making progress towards our 'best practice' targets. We calculate that collectively (excluding Iceland) our surveyed retailers have made a 22 per cent health improvement compared to 2004 in overall scores.
- Despite these improvements, as in 2004, our results show no retailer scoring well in all four key areas that we investigated, and some retailers continuing to score



Retailers' 2005 Health Responsibility Index score, compared to 2004

Notes: scores have been rounded to nearest 0.5

n/r = not rated

[3] *Tackling health inequalities: status report on the programme for action,* Department of Health, August 2005

Name: Co-op

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Still top scorer but with slightly reduced score. Had the least salty sausages (less than the FSA target) with half the salt of the saltiest. Fell down on having saltier bread and crisps than last year.	5½/10	6/10
Labelling information			
Nutrition labelling	Very good. As in 2004, a top score. All surveyed products – including economy – carried full nutrition labelling and translated sodium into salt.	10/10	10/10
Use of Guideline Daily Amounts	Only a quarter of products surveyed – five out of 21 – carried GDAs, a slightly lower percentage than last year.	2½/10	3/10
Interpretative Nutrition Labelling	Co-op's 'high/medium/low' nutrient descriptors are still the only interpretative scheme found on all surveyed products. Awaiting outcome of FSA research before developing further.	9/10	9/10
In-store promotions			
Promotions for fruit and vegetables	17% of promotions for fruit and vegetables – half our target level. Only company to have a policy for promoting healthier foods – our survey found the company just meeting its own minimum target (25%) for promotions of a wider range of healthier foods.	5/10	3/10
Snacks at the checkout	As in 2004, 2 out of 13 checkouts still carried sweets and unhealthy snacks.	8½/10	8½/10
Customer information & advice			
Healthy eating leaflets	We found one brief but useful leaflet – an improvement on 2004, but less extensive information than many other retailers.	1/5	0/5
Information from customer helpline	Top marks – only company to answer our questions confidently and fully.	5/5	0/5
Overall comments and score	This year the Co-op has improved its overall score to move up from 3rd to 1st place. 2006 provides an opportunity for on-going salt reductions – including focusing on 'economy' products, removing unhealthy snacks from all checkouts and introducing more extensive in-store information. Overall ranking: 1st.	6½/10	5/10

poorly relative to other retailers. Our top score (6.5 out of 10) did not improve. Our results provide a mandate for continuing progress and commitment to ongoing action. There is no room for complacency.

- Best overall improvers are Asda, Co-op, Marks & Spencer (M&S) and Somerfield – each improving their overall score out of 10 by 1.5 points. Morrisons and Tesco showed modest improvements to their overall score – 1 point and 0.5 point respectively. Sainsbury's and Waitrose did not increase their overall score, though both retailers have made progress in more than one of the four key areas we investigated. We are unable to compare overall progress for Iceland - we included the company in our rating for the first time this year at the company's request.
- We continued to see the trend identified last year – overall, more 'up-market' retailers tended to gain a higher Health Responsibility Index rating, while those with a greater proportion of lower-income shoppers scored less well. As in 2004, the Co-op remained a notable exception, and Asda's improved score this year illustrates that company policies can buck this trend. But the dominance of Morrisons, Somerfield, Iceland and Tesco at the lower end of our ranking again illustrates our conclusion that retailers' practices are contributing to, or exacerbating, the inequalities that exist between the diet and health of more affluent and less affluent consumers.
- Of note this year was an added emphasis from many companies on working with government to improve nutrition profiles of own-brand foods and on interpretative nutrition labelling. Though, as with last year, we found a lack of clarity from many companies over targets and timescales. All companies, with the exception of Morrisons, as in

Name: Marks & Spencer

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Good progress on salt reductions across a range of products. Has cut salt levels in last year's saltiest pasta sauce by two-thirds to now have one of least salty sauces. Had the least salty salt and vinegar standard crisps. No economy range of foods.	5/10	3½/10
Labelling information			
Nutrition labelling	Maintained full score for declaring full nutrition information and translating sodium into salt on all surveyed products.	10/10	10/10
Use of Guideline Daily Amounts	Has increased the number of products carrying GDAs – 15 out of 19 surveyed products. The highest scorer in this area with Waitrose.	8/10	5½/10
Interpretative Nutrition Labelling	Has 'Eat Well' logo that company says positively signposts healthier foods – but not found on surveyed products.	0/10	0/10
In-store promotions			
Promotions for fruit and vegetables	Top scorer with 27% of price promotions for fruit and vegetables – though still short of 33% target. High level (27%) of promotions for fatty and sugary foods – though along with Asda – the lowest of all retailers.	8/10	9/10
Snacks at the checkout	Biggest improver offering more snack-free checkouts this year – but one-third continue to have kids' confectionery at child height.	6/10	1½/10
Customer information & advice			
Healthy eating leaflets	Disappointing compared with last year. We found a limited range of brief leaflets and no health or 'five a day' messages found in magazine.	1½/5	5/5
Information from customer helpline	Good. One of only three retailers able to give correct and reasonably full information to our questions.	4½/5	0/5
Overall comments and score	Good improvement, particularly on salt reductions, extending number of sweet-free checkouts, and wider use of GDAs. Top scorer for fruit and veg promotions and good score for helpline information. 2006 is opportunity to continue to cut back on salt, introduce interpretative labelling and in-store information. One of the better overall improvers, pushes M&S up into joint 2nd place.	6/10	4½/10

Name: Waitrose

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Mixed picture - some reductions in salt but also two increases (baked beans and tomato soup). Company says it has also cut salt in pasta sauce, sunflower spread, cornflakes and sausages – but not yet reflected on labels nor our score. For healthier range all 5 products found met FSA targets. Does not have 'economy' range.	4/10	4/10
Labelling information			
Nutrition labelling	Good score. Declared 'full 8' on all products surveyed. Significant increase in number of products translating sodium into salt.	9½/10	8/10
Use of Guideline Daily Amounts	GDAs for calories, fat and salt now on the majority of surveyed products (14 out of 18) – an increase on last year.	8/10	5½/10
Interpretative Nutrition Labelling	None found.	0/10	0/10
In-store promotions			
Promotions for fruit and vegetables	With just over 20% of promotions for fruit and vegetables, Waitrose was one of the higher scorers – but still short of the 33% target.	6½/10	6/10
Snacks at the checkout	Full marks, as last year. Waitrose continues to have no sweets or snacks at checkouts.	10/10	10/10
Customer information & advice			
Healthy eating leaflets	Less impressive information available compared to last year. No leaflets, though there was a useful magazine and good recipe cards.	3/5	5/5
Information from customer helpline	Correct but limited information on 5 A Day – also sent useful booklet. But failed to provide answers on salt – advised looking at website.	3½/5	5/5
Overall comments and score	Slightly reduced score compared to 2004, but this does not reflect salt reductions the company says it has made, which were not shown on labels at the time of the survey. Good progress on 'healthy eating' range, salt reductions. Top labelling improvements and top marks again for no snacks at checkouts. Top 'health responsibility' retailer last year, but pipped by Co-op into joint second place with Marks & Spencer.	6/10	6½/10

2004, provided us with details of relevant company policies.

- Last year, our findings suggested that retailers were ahead of many leading branded food manufacturers in reducing excess salt and providing more helpful nutrition labelling. This year we note some evidence that some food manufacturers are catching up.

How do the retailers score?

We provide individual 'report cards' for each retailer showing both this year's and last year's scores. These are displayed in the order in which supermarkets have been ranked.

In summary:

The Co-op improved its score and ranking to rate number one.

The Co-op maintained its position as top scorer on nutrition labelling and the cutting of excess salt. Also, a good score for information from their customer helpline – the Co-op was the only company to answer our questions confidently and fully. But with 6.5 out of ten – no higher than last year's highest score from Waitrose – there is room for further improvement.

In joint second place, M&S and Waitrose

With its improved overall score, M&S jumps from fourth to second place with measurable improvements in the cutting of excess salt, extending the number of sweet-free checkouts, and with more extensive nutrition labelling. M&S was also the top scorer for fruit and vegetable price promotions and one of the top scorers for its helpline information. One of the best overall improvers in 2005.

Waitrose maintains its position among the top scorers this year.

The company's score does not reflect the salt reductions the company says it had made. These

Sainsbury's

Name:

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Poor score – despite salt reductions in 3 out of 10 'standard' products. Four products contained more than last year. Cheese and tomato pizza was saltiest we found – three times the FSA target level. Better score for 'economy' range – 6 out of 10 products had lower salt than standard equivalents.	2½/10	3½/10
Labelling information			
Nutrition labelling	Good improvement in number of products translating sodium into salt. Virtually all surveyed products carried full-8. Economy fat spread failed to declare amount of saturated fat.	9½/10	8/10
Use of Guideline Daily Amounts	Inconsistent picture – 13 out of 30 products carried GDAs.	4/10	5/10
Interpretative Nutrition Labelling	Two 'healthier' products carried front of pack 'Wheel of Health' colour coded logo.	3/10	1/10
In-store promotions			
Promotions for fruit and vegetables	Large number of price promotions found (415) but only 65 (15.5%) for fruit and veg – half our target of 33%. Promotions for fatty and sugary foods made up a third of all promotions (33%).	5/10	4½/10
Snacks at the checkout	Full marks – we found no checkouts with unhealthy snacks.	10/10	9½/10
Customer information & advice			
Healthy eating leaflets	Good – we found several useful leaflets and magazine with 'healthier' recipes and nutrition information.	4½/5	5/5
Information from customer helpline	Could only provided limited information and gave incorrect information about 'Wheel of Health'.	3/5	2½/5
Overall comments and score	Some improvements in labelling and removing all snacks from checkout, but let down by increases in salt for some products. No improvement in overall score means rating down from 2nd place last year to 4th this year. 2006 is the opportunity to work on salt reductions and roll out interpretative labelling in line with FSA advice. Overall ranking: 4th.	5½/10	5½/10

Name: Asda

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	One of only three companies to have five surveyed products already meeting FSA target. Had the least salty 'economy' foods. Fell down on 25% salt increase in 'standard' bread. Slight improvement in overall score – based on standard products – though not represented by 'rounding'.	4/10	4/10
Labelling information			
Nutrition labelling	Very good. As in 2004, a top score. All surveyed products – including economy – carried full nutrition labelling and translated sodium into salt.	10/10	10/10
Use of Guideline Daily Amounts	A minority of products – four out of 29 – carried GDAs – no discernible increase from 2004.	1½/10	1½/10
Interpretative Nutrition Labelling	No progress – some front-of-pack nutrient information. Company says it supports common industry-wide approach and is waiting for FSA advice.	1/10	1/10
In-store promotions			
Promotions for fruit and vegetables	Fruit & veg made up only 11.5% of price promotions, compared to 27% for 'fatty' and 'sugary' foods.	3½/10	4/10
Snacks at the checkout	A welcome start to cutting back on unhealthy snacks at the checkout. But with only 5 out of 44 aisle 'snack-free', still a long way to go compared to most other retailers.	1/10	0/10
Customer information & advice			
Healthy eating leaflets	Useful booklets and a good magazine gives Asda one of the top scores.	4/5	0/5
Information from customer helpline	One of the top scores – Asda's helpline was one of only three able to provide correct and reasonably full information to our questions.	4½/5	2½/5
Overall comments and score	One of the better improvers – rating highly for quality of information and advice. Good start to removing snacks from checkouts – we hope to see further progress. 2006 provides an opportunity to also move forward on interpretative labelling, increasing numbers of price promotions for 'healthier' foods and – as with all retailers - continuing to cut back on salt. Overall ranking improves from 7th to 5th place.	4½/10	3/10

were not shown on labels at the time of our survey. It has made good progress on salt reduction in its 'healthy eating' range and with labelling improvements, and it took full marks again for having no snacks at its checkouts. A reduced score this year for information and advice.

This year Sainsbury's drops to fourth place

No overall improvement in its score means Sainsbury's drops from second place to fourth this year. We found some improvements in removing all snacks from its checkouts and in nutrition labelling, but these were let down by increased amounts of salt in some product categories. Sainsbury's has introduced its 'Wheel of Health' signpost labelling. In 2006 we hope to see this developed in-line with Food Standards Agency (FSA) guidance.

Asda improves and moves into fifth place

One of the better overall improvers, Asda improved its score and ranking this year. It rated highly for its information and advice in 2005 and has made a start by removing sweets at some checkouts – though it still has a long way to go in this area to catch up with most other retailers. Asda has the least salty 'economy' range in our survey – less salty than many of its 'standard' products.

Tesco drops to sixth place

A pedestrian performance and low ranking this year for Tesco. With only a modest half point score increase, the UK's largest retailer slipped down our league table from equal fifth to 6th place – and has been overtaken by Asda. As in 2004, Tesco does not rank highly for any indicator except removing unhealthy snacks from the checkout. It had the least helpful helpline in our survey, failing to answer our questions.

Name: Tesco

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Modest improvement – only one standard product contained less salt than last year and only one out of 24 surveyed products met FSA target. Nearly all 'economy' products have same or less salt than standard product. Room to reduce salt across all ranges.	4/10	3½/10
Labelling information			
Nutrition labelling	Improvement in number of products translating sodium into salt, but over a third of surveyed products still don't.	8½/10	6/10
Use of Guideline Daily Amounts	Only five out of 29 products carried GDAs. No apparent increase.	2/10	2½/10
Interpretative Nutrition Labelling	A handful of products carried some front-of-pack information, but no surveyed products carried Tesco's new GDA-based 'signpost' labels.	1/10	1/10
In-store promotions			
Promotions for fruit and vegetables	Out of 370 price promotions, only 53 (14%) were for fruit and veg – compared to 35% for fatty and sugary foods – one of the largest amounts.	4/10	4/10
Snacks at the checkout	Full marks – all checkouts this year were free of 'unhealthy' snacks.	10/10	9/10
Customer information & advice			
Healthy eating leaflets	Some leaflets, but no magazine found.	2/5	0/5
Information from customer helpline	Least helpful helpline of all companies. Failed to provide any information or answer our questions. Helpline staff said he had 'never heard of 5 A Day'.	0/5	0/5
Overall comments and score	Disappointing score from the UK's biggest retailer – only a very modest overall improvement. Tesco does not rank highly for any indicator except removing unhealthy snacks from the checkout. In 2006 needs to focus on all areas for improvement. Is overtaken by Asda to rank 6th overall.	4/10	3½/10

Name: Iceland

Date of report: July 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Good score for salt reductions in pizza and pasta sauce, both of which meet FSA targets – but lost marks for having the saltiest sausage in our survey (nearly twice the FSA target). Hard to compare whole range due to limited number of survey products found. Only company not to offer 'healthy eating' range.	4½/10	5½/10
Labelling information			
Nutrition labelling	Good but slightly reduced score due to no salt declaration on one product (economy sausages). Also small sample size compared to other companies.	9½/10	10/10
Use of Guideline Daily Amounts	A start – has introduced GDAs. Found on one out of nine products surveyed.	1/10	0/10
Interpretative Nutrition Labelling	None found.	1/10	0/10
In-store promotions			
Promotions for fruit and vegetables	15% of price promotions for fruit and vegetables largely frozen. Has limited range of fresh fruit and vegetables. High proportion of promotions for fatty and sugary foods (35%).	4½/10	N/A
Snacks at the checkout	Lowest score – all three checkouts carried unhealthy snacks, though much smaller size store than other retailers.	0/10	2½/10
Customer information & advice			
Healthy eating leaflets	No improvement – along with Morrisons, the only company where we found no relevant leaflets or magazines.	0/5	0/5
Information from customer helpline	Gave correct information about 5 A Day, but poor and incorrect information on salt.	3/5	0/5
Overall comments and score	First year we have rated Iceland overall – at the company's request. Hard to compare due to small store size and small range of surveyed products found. Has made good reductions on salt for some products and promotes its frozen range of fruit and vegetables. 2006 provides an opportunity for company to improve in all areas. Rated 7th overall.	3½/10	n/a

Name: Somerfield

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	We found two out of ten standard products with less salt. Company says it has also reduced salt in tomato ketchup, baked beans and cornflakes, but not declared on labels at time of survey.	3½/10	2½/10
Labelling information			
Nutrition labelling	As in 2004 – declared full-8 nutrients on all surveyed products. Has extended the number of products translating sodium into salt.	8/10	6/10
Use of Guideline Daily Amounts	Slight improvement but limited number of products with full GDAs (2 out of 12). More products carried salt GDA only (10 out of 12).	3/10	2/10
Interpretative Nutrition Labelling	None found. Company says it's awaiting outcome of FSA research. Concerned about potential confusion to customers of different schemes.	0/10	0/10
In-store promotions			
Promotions for fruit and vegetables	Lowest score of all companies – only eight out of 109 (7%) promotions were for fruit and veg, with over four times as many promotions for fatty and sugary foods.	2/10	3/10
Snacks at the checkout	Disappointing increase in the number of checkouts with unhealthy snacks – from half last year to 7 out of 10.	3½/10	5/10
Customer information & advice			
Healthy eating leaflets	Good magazine providing extensive information, recipes and advice. No leaflets found in-store.	3/5	0/5
Information from customer helpline	Provided correct but very limited information on 5 A Day but unable to provide information on salt. Failed to call back.	1/5	0/5
Overall comments and score	Some improvements in salt reduction and labelling, and a good magazine, gives Somerfield a modest improvement in overall score. Room for improvements in 2006 across all indicators, including further salt reductions, increasing promotions for healthier foods while reducing unhealthy snacks at the checkout. Ranking: joint 7th with Iceland.	3½/10	2/10

Name: Morrisons

Date of report: June 2005

Subject area	Comments	2005	2004
Nutritional content			
Salt content of standard own-brand foods	Morrisons 'standard' products remain the saltiest in our survey – only one 'standard' product (bread) contains less salt than last year. Better picture on 'economy' range – six out of ten surveyed products had less salt than 'standard' equivalent and 'economy' pizza one of only two 'economy' products in survey to meet FSA targets.	2½/10	1½/10
Labelling information			
Nutrition labelling	Improving – all but one product with 'full-8' nutrition information and more products with salt equivalent figures.	9/10	7/10
Use of Guideline Daily Amounts	Confused picture – no increase in low level of products carrying GDAs (4 out of 20).	1½/10	2½/10
Interpretative Nutrition Labelling	None found.	0/10	0/10
In-store promotions			
Promotions for fruit and vegetables	Morrisons had the largest number of price promotions (462) but only 9% were for fruit and veg, compared to 29% for fatty and sugary foods.	2½/10	3/10
Snacks at the checkout	No change. All checkouts carry snacks but none at child height.	5/10	5/10
Customer information & advice			
Healthy eating leaflets	No relevant leaflets or magazine found.	0/5	0/5
Information from customer helpline	Disappointing response. Could not provide most information requested.	1½/5	0/5
Overall comments and score	Slight improvement on salt and nutrition labelling – but overall still rating poorly compared to other retailers. 2006 is the opportunity to work on all areas – but particularly balance of promotions and salt reductions. Overall ranking 9th – as last year bottom of the pack.	3/10	2/10

In joint seventh position, Iceland and Somerfield

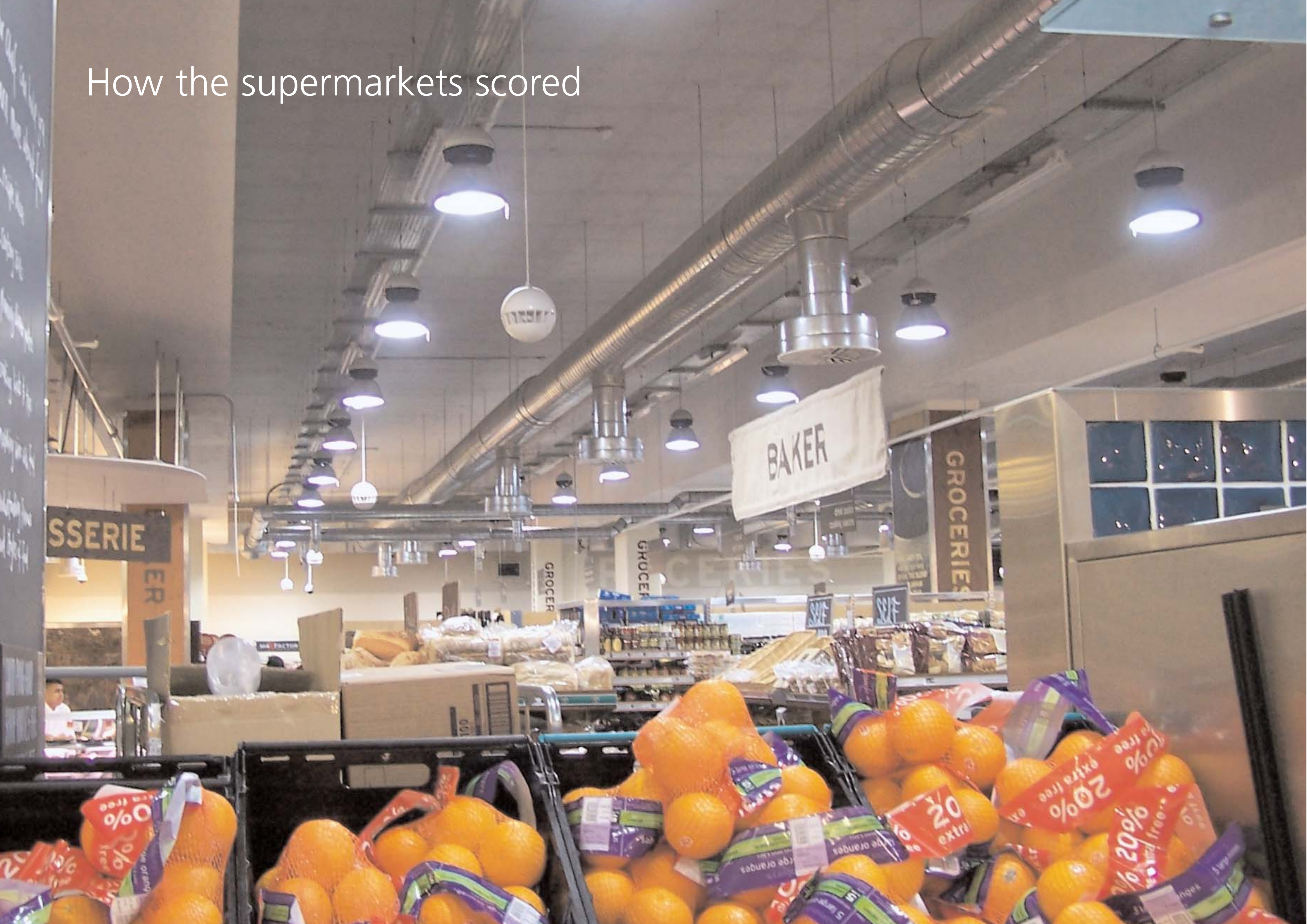
It was hard to compare Iceland due to the smaller range of surveyed products found. We found some good salt reductions, but the company lost points for having the saltiest sausage in our survey.

Somerfield rates as one of our overall score improvers, but still ranks low in comparison with other retailers. We found some salt reductions and the company says it has made more, but these were not yet reflected on labels at the time of our survey. A good in-house magazine bumped up Somerfield's score on information and advice, but its helpline response let it down. It had the lowest score of all companies for fruit and vegetable price promotions (seven per cent) – four times less than promotions for fatty and sugary foods (29 per cent).

In ninth position – Morrisons

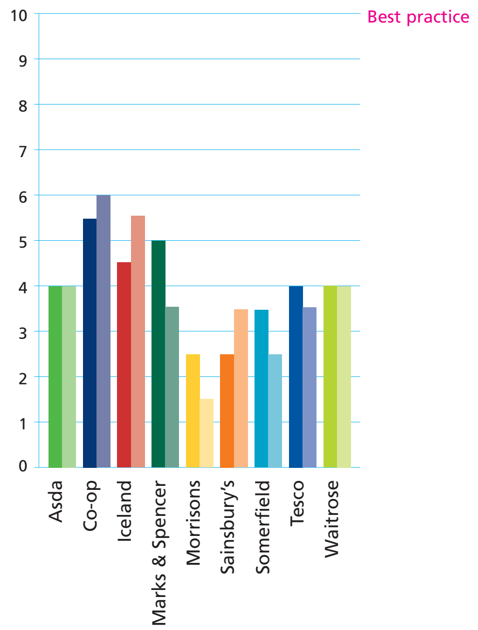
Despite some improvements on salt reduction, Morrisons 'standard' products remained the saltiest in our survey. Its 'economy' range presented a better picture - six out of ten products had less salt than their 'standard' equivalent. Morrisons had the largest number of in-store price promotions in our survey – 462 – but only nine per cent were for fruit and vegetables. As in 2004, it was the only company not to respond to our written request for details of relevant company policies.

How the supermarkets scored



1 Nutritional content

Salt



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

2005 scores
2004 scores

Indicator: Sodium (salt) content of ten everyday 'standard' own-label processed foods.

▷ **Target:** FSA 'target average' sodium levels (2003)

We compared the levels of sodium (salt) declared in on-pack nutrition information panels with our target (the same FSA salt model levels we used last year) for the following ten own-label 'standard' products. Where available, we also collected salt data on 'economy' and 'healthier' equivalent foods.

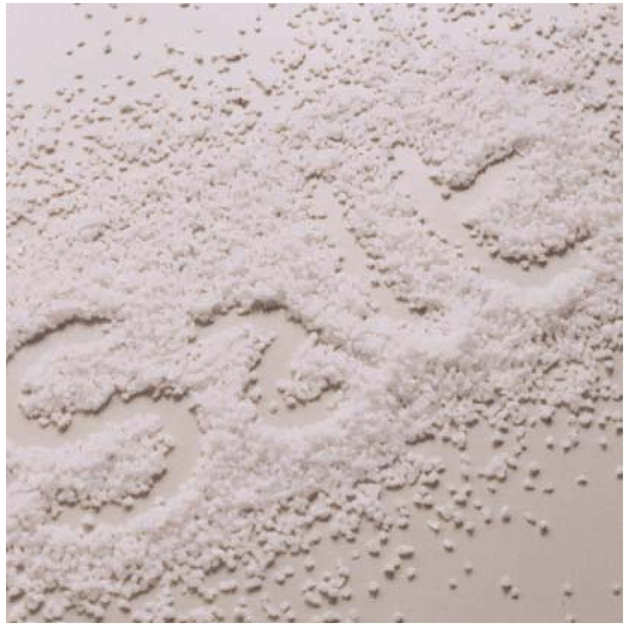
- Baked beans
- Canned tomato soup
- Cheese and tomato pizza
- Cornflakes
- Pork sausages
- Salt and vinegar crisps
- Sunflower/vegetable fat spread
- Tomato ketchup
- Tomato pasta sauce
- White sliced bread.

This year we continued to find considerable variation between retailers. For example, Co-op sausages (0.5g sodium/100g) contained less salt than our target and only half the salt of Iceland's (1.0g sodium/100g) – the saltiest sausage in our survey.

On the basis of this year's figures we calculate that where you shop could still add as much as 22 per cent more salt to your diet (compared to 25 per cent last year).

We found all retailers had lower salt levels in some products. But of the 82 'standard' products that we surveyed, only five met the target (a small improvement on 2004 – when only two did so).

We also found higher levels of salt in a small number of products. For example, four Sainsbury products – cheese and tomato pizza, vegetable fat spread, salt and vinegar crisps and pork sausages – had more salt than products we sampled last year. The pizza contained 0.9g sodium/100g – three times the target level and three times as much as the M&S pizza (0.3g sodium/100g).



The Co-op retained its top position on salt, but the gap has narrowed due to good progress by M&S on salt reductions across a range of products. M&S was the best overall improver for this indicator.

Morrisons also improved its score for sodium levels (from 1.5 to 2.5) though, overall, its products are still the saltiest in our survey (with Sainsbury's).

The scoring for Waitrose and Somerfield does not reflect the additional salt reductions the companies told us they had made as these were not reflected on labels at the time of our survey.

Economy ranges:

All the stores surveyed offered a lower price 'economy' range of products, except for M&S and Waitrose. These were variously described as 'Smartprice' (Asda), 'Everyday' (Co-op), 'Super Value' (Iceland), 'Bettabuy' (Morrisons), 'Basics' (Sainsbury's), 'Makes Sense!' (Somerfield), and 'Value' (Tesco).

We found that the majority of 'economy' own-brand foods we surveyed were likely to contain the same amount, or less, salt than their standard counterparts. Of the 48 'economy' range foods we sampled, predominantly from Asda, Morrisons, Sainsbury's and Tesco, four out of five (79 per cent) contained the same, or lower, salt levels.

Asda had the least salty 'economy' range of surveyed foods, closely followed by Tesco.

Healthier ranges:

In all the surveyed stores, we found products as part of the retailers' 'healthy eating' range of own-label foods. These were variously described as 'Good for You' (Asda), 'Healthy Living' (Co-op), 'Good Choice' (Iceland), 'Count on Us' (M&S), 'Better for You' (Morrisons), 'Be Good to Yourself' (Sainsbury's), 'Good Intentions' (Somerfield), 'Healthy Living/Healthy Eating' (Tesco) and 'Perfectly Balanced' (Waitrose).

Within our surveyed foods, M&S, Morrisons, Sainsbury's, Tesco and Waitrose offered the greatest choice of 'healthier' alternatives and Iceland and Somerfield the least. We also found 'healthier' alternatives that were not part of these ranges.

We found virtually all 'healthier' own-label foods tended to have less salt than 'standard' products – none had more.

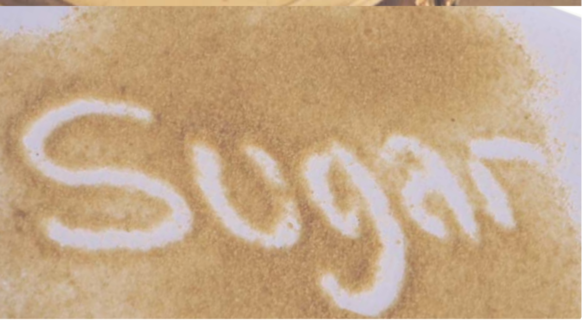
Of the 43 'healthier' products that we surveyed 18 (42 per cent) achieved the FSA sodium targets – a slight increase on last year.

Brands:

We found some of the leading brand comparisons have made significant progress in cutting back on salt over the year. We found Heinz baked beans and tomato soup, Kellogg's cornflakes and Flora vegetable-fat spread among the least salty products in our survey.

But other brand leaders – Goodfellow's (cheese and tomato pizza), Heinz (tomato ketchup), Walkers (salt and vinegar crisps), Kingsmill and Hovis (white bread) – remained among the saltiest in our survey.

Fat, saturated fat and sugar



We have not rated retailers for fat and sugar due to the lack of FSA targets. From our small scale comparisons of fat and saturated fat (in sausages, pizza and crisps) and sugar content (in ketchup, yogurt and frosted cereal) we observe:

Fat and saturated fat

We found variations in the fat and saturated fat content – particularly with sausages. M&S had the fattiest standard sausages in our survey (29.1g/100g) – over twice the fat of Waitrose, the leanest (12.4g/100g)

We could discern no overall trend towards fat reduction from last year. While some products contained slightly less, a similar number contained more – most notably for cheese and tomato pizzas. Six out of the nine supermarket pizzas we surveyed contained either more fat, saturated fat or both.

'Economy' sausages generally had slightly less fat than standard sausages (probably due to lower meat content). However, except for Asda, all four 'economy' pizzas surveyed (Asda, Iceland, Morrisons and Sainsbury's) had higher levels of fat and saturated fat than standard equivalents.

In general, the 'healthier' options (mainly sausages) offered significantly reduced fat and saturated fat content – cutting both by 50 per cent or more in most cases.

Our brand comparisons for sausages (Wall's), pizza (Goodfella's) and salt and vinegar crisps (Walkers) were among the fattiest products in their categories that we surveyed.

Sugar

We found variations in the sugar content of tomato ketchup and strawberry yogurt products offered by different retailers. Tesco's economy strawberry yogurt contained nearly twice as much sugar as Sainsbury's, and Asda's 'healthier' tomato ketchup had half the sugar of the Co-op's.

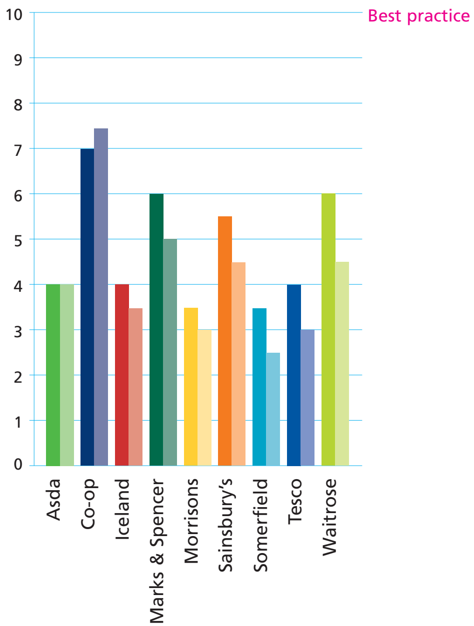
As in 2004, all standard frosted cereals contained about the same, high amount of sugar – 38g/100g.

For our three surveyed products, we found only a small number of 'economy' products, though virtually all contained approximately the same, or less, sugar than their standard counterparts. The two retailers that sold economy frosted cereals (Asda and Tesco) offered products with significantly less sugar (28 and 27g/100g respectively) than standard equivalents.

All the 'healthier' frosted cereal (one), ketchup (three) and yogurt (seven) products we found contained less sugar than their standard counterparts.

Our brand comparisons showed a mixed picture. Kellogg's frosted cereal and Heinz tomato ketchup were comparable to many retailers' products, though Müller yogurt contained the lowest sugar of all the 'standard' yogurts we surveyed.

2 Labelling information



Retailers' scores out of ten for labelling information

Note: scores have been rounded to nearest 0.5

2005 scores
2004 scores

As in 2004, our three indicators are:

Indicator: 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.

Indicator: Use of GDAs on nutrition labelling

▷ **Target:** GDAs for calories, fat and salt declared.

Indicator: Use of interpretative nutrition labelling

▷ **Target:** use of front-of-pack interpretative nutrition labelling.

Overall, the Co-op retained top position in this category but with less of a lead – M&S, Sainsbury's and Waitrose have all narrowed the gap.

Many of the retailers have improved their nutrition labelling practices since last year, most notably:

- Morrisons, in providing more products with the full-8 nutrition information and translation of sodium into salt compared to 2004;
- Sainsbury's, Somerfield, Tesco and Waitrose, in extending the number of products for which sodium is translated into salt, though Somerfield and Tesco still lag behind other companies for salt information – over a third of the Tesco products surveyed (11 of the 29) did not translate sodium into salt.

As in 2004, we found a confused and inconsistent picture on GDA labelling. Just over a third of the products we examined for labelling information (73 out of 205) carried some kind of GDA information. Generally, GDAs were less likely to be provided on 'economy' products compared to 'standard' or 'healthier' products. Of note were:

- M&S and Waitrose for increasing the percentage of products carrying GDAs – now found on the majority of the products we surveyed; and
- Iceland, for introducing GDAs.

A number of companies are showing an increased interest in front-of-pack interpretative 'signpost' labelling. As we found last year, the Co-op was the only company providing its own high/medium/low 'interpretative' labelling on all products surveyed. This year, Sainsbury's, Tesco and M&S have introduced their own, different schemes, though we found these on only two Sainsbury's products we surveyed. Other companies have told us they believe the responsible approach is to wait for FSA guidance before introducing a common industry approach.

For brands, we found more companies translating sodium into salt (six out of 15 compared to one last year) and declaring GDAs (up from two products to six). Improvers were Kellogg's, Heinz (for baked beans and soups), Hovis and Flora. Kellogg's was the only company we found offering some form of 'interpretative' labelling.

3 In-store promotions

As in 2004, we measured the emphasis retailers give in-store to the promotion of 'healthy' relative to 'less healthy' foods. This year, we modified the first of our two indicators:

Indicator: the proportion of in-store price promotions for 'healthy' foods (fruit and vegetables).

▷ **Target:** 33 per cent, the percentage we are advised that fruit and vegetables should make up of our total diet.

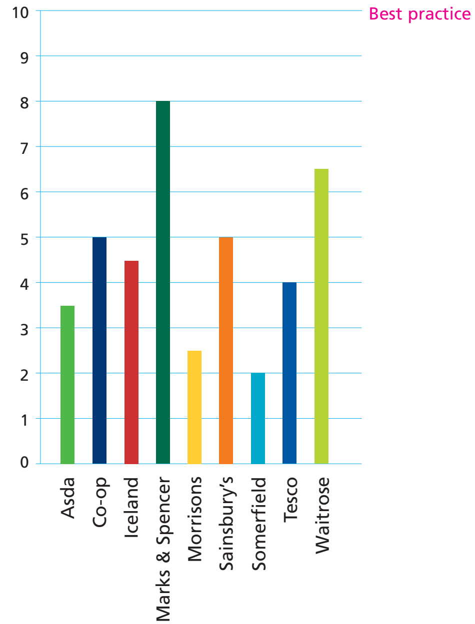
Indicator: the presence of sweets and 'less healthy' snacks at the checkout.

▷ **Target:** none.

Our surveyors counted and classified a total of 2,346 price promotions – 462 in Morrisons alone. We found considerable variation between retailers' practices. The proportion of price promotions on fruit and vegetables ranged from seven per cent (Somerfield) to 27 per cent (M&S).

No retailer reached our target of 33 per cent.

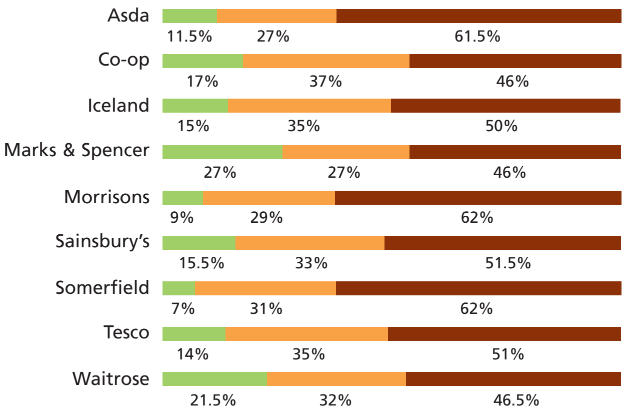
In respect of in-store promotions, we conclude that the majority of retailers are undermining public health goals. All retailers, except M&S, had over twice as many promotions for 'fatty and sugary' foods as for fruit and vegetables; these were over three times more in the Morrisons store surveyed, and over four times more in Somerfield – and these are both retailers with comparatively higher numbers of low-income customers.



Retailers' scores out of ten for fruit and vegetable price promotions

Notes: scores have been rounded to nearest 0.5

This indicator was not scored in 2004



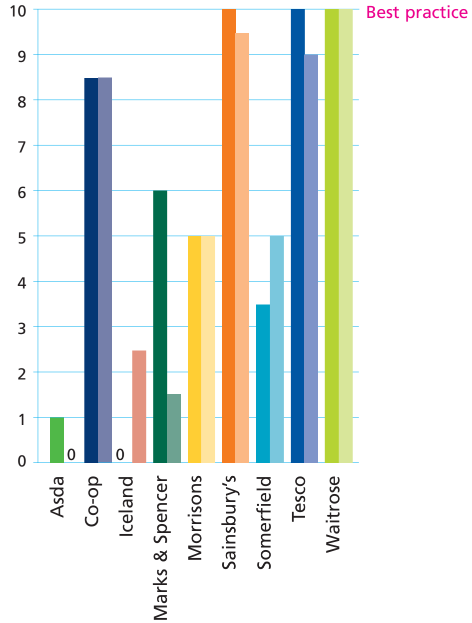
Price promotions for fruit and vegtables and fatty and sugary foods as percentage of total food promotions

Note: scores have been rounded to nearest 0.5%

Fruit and vegetables
Fatty and sugary foods
Other foods

Snacks at the checkout

This year, we found an increased number of retailers with checkouts free of 'unhealthy' snacks (Waitrose, Sainsbury's and Tesco). Biggest improvers were M&S, where more than half the checkouts are now snack-free (though the remainder continued to have displays of confectionery – many linked to children's films and cartoons – at child height). Asda is also an improver: it is now starting to remove sweets from some checkouts.



Retailers' scores out of ten for snacks at the checkout

Notes: scores have been rounded to nearest 0.5

2005 scores
2004 scores

4 Customer information and advice

Indicator: information and advice on healthy eating available through in-store leaflets and magazines, and via retailers' national telephone helplines.

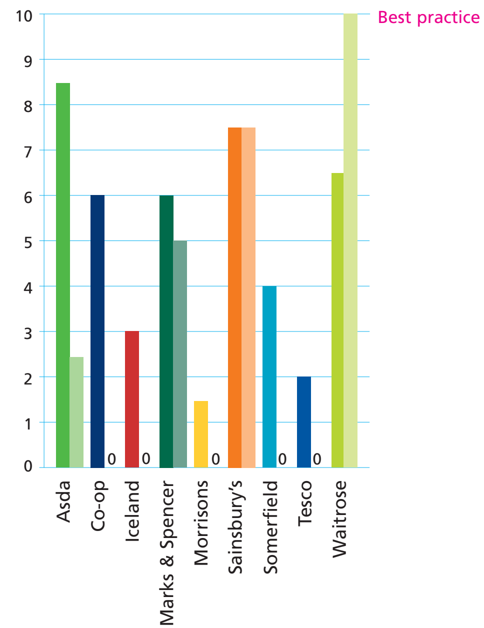
▷ **Target:** Good availability of correct information and advice.

This year we modified our indicator to include free in-store magazines and advice available via the retailers' telephone helplines (rather than customer service desks as in 2004). In an anonymous shopper exercise, company helplines were asked for information about the 5 A Day message and questions about salt and health (see Appendix 1).

Last year, we were disappointed by the generally poor availability and quality of nutrition and health information, interpretation and advice offered in-store by supermarkets. By seeking information from helplines we expected both helpful and correct answers from trained staff. But this year, again, we continued to find a mixed picture.

No retailer scored full marks. Asda rated highest with 8.5 out of 10 – with good marks for both its information on healthy eating in leaflets and in the company's free magazine, and via its customer helpline. Asda was also one of only three companies – along with the Co-op and M&S – whose helpline could provide correct and reasonably full information to our questions. Sainsbury's also rated fairly well, with Waitrose, Co-op and M&S scoring just above average.

The most disappointing performers were Morrisons and Tesco. For Tesco, we found only limited information in leaflets, no magazine, and a helpline unable to answer any of our questions or provide further information. The helpline staff said he had 'never heard of 5 A Day'.



Retailers' scores out of ten for in-store and helpline information and advice

Note: scores have been rounded to nearest 0.5

2005 scores

2004 scores

The NCC's 20 simple steps for supermarkets

We call on supermarkets 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 (CSR) 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 2007.
6. Work with the FSA to develop targets for fat, saturated fat and sugar.
7. Prioritise 'economy' brands in salt reduction programmes and in developing fat and sugar reduction strategies.
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 advised by the FSA.
12. Provide front-of-pack interpretative 'signpost' labels on all own-label foods, in promotional material and on shelf tags following FSA guidance.

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 – especially on key public health messages.
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 recommendations for government

We call on the Department of Health to:

- Provide leadership and clear messages on health and nutrition that retailers and manufacturers can support.
- Adopt the NCC's Health Indicators as a means of measuring supermarket progress in promoting healthy eating, as part of its Food and Health Action Plan to monitor and publish progress annually.
- Develop measures for tracking consumption trends, particularly for disadvantaged groups within the population.
- 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' and manufacturers' progress towards achieving Health Indicator targets.
- Build on its approach to salt and develop and monitor food-based targets for fats, saturated fat and sugar.
- Include 'economy' brands in its monitoring target development programmes.
- Issue 'best practice' guidance on nutrition labelling information, including 'signpost' labelling; in-store promotion and information and advice.
- Work with retailers, manufacturers 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).

Taking it forward

Our results this year demonstrate the progress that companies are making towards our Health Responsibility Index targets. We can show where companies are removing excess salt, improving nutrition labelling, removing confectionery and other unhealthy snacks from supermarket checkouts, and are able to provide helpful and correct information and advice on healthy eating to their customers.

The trend generally is in the right direction – for many of our indicators we found some companies scoring well or showing improvements compared to last year. But we also found huge inconsistencies, with no company scoring well for all our indicators.

Most disappointing is that none of the big four retailers – Tesco, Asda, Sainsbury's and Morrison's – scored in our top three this year. These four companies alone have the power to influence how we spend three-quarters of our national grocery bill. Even small changes by these companies can impact on the daily food choices of the majority of UK consumers.

So why do we find such discrepancies? If one company can, for example, cut salt levels to meet FSA targets, or commit to healthy foods comprising a percentage of its in-store price promotions, then we see no obvious reason why all cannot. Essentially, in our view, it is a matter of will. We know that tackling obesity and turning around our food culture into one that promotes, rather than undermines health is not an overnight feat. It will require policies and practices – and the will to initiate and see them through – implemented over many years.

Last year we reported that health and nutrition had not featured prominently on most food companies' CSR agendas. This year, Asda, M&S, Sainsbury's, Tesco and Somerfield told us of welcome new CSR commitments or reporting, but as Somerfield honestly acknowledges, there is more that needs to be done. The Department of Health and the FSA have key roles in developing best practice 'targets' and monitoring progress. But while these remain voluntary there will be a continuing need for independent research – such as ours – to keep companies on their toes.

Health for all

Statistics on diet and health reveal startling inequalities – poorer women, for example, are twice as likely to be obese as women from higher-income families, and fruit and vegetable consumption mirrors social class. Even more worrying is the finding from new government statistics on health inequalities that: 'Since 2001 there had been no improvement in fruit and vegetable consumption for the most disadvantaged groups and no significant narrowing of the gap'[4]. Not only do lower-income consumers suffer the worst diet-related ill-health, they also face the greatest barriers to healthier eating. Last year the government stepped up its commitment to tackling health inequalities, highlighting the relevance of health inequalities to reducing heart disease, stroke and related disease by at least 40 per cent, and cancer by at least 20 per cent, by 2010. It also introduced a new commitment: to halt the increase in obesity among children under 11 by 2010 as part of a broader strategy to tackle obesity in the population as a whole.

Last year we concluded that retailers' practices were contributing to, or exacerbating, the inequalities that exist between the diet and health of more affluent and less affluent consumers. We calculated that where you shop could add up to as much as 25 per cent more salt in your diet, and that less healthy products and promotions were most often found in retailers serving the least wealthy.

As a result we give added focus in our survey this year to budget-conscious shoppers.

We included 'economy' own-brand products to our survey and found no evidence that, in general, 'economy' brands are less 'healthy' than their 'standard' counterparts – though larger scale monitoring would be required to confirm this. We recommend that the FSA include economy brands in its own monitoring and that companies prioritise economy brands in continuing their salt reduction programmes and in developing fat and sugar reduction strategies.

One of the recent trends in food retailing has been the rise of price promotions – such as buy-one-get-one-free offers (known as 'bogofs'). Most shoppers – but particularly the budget-conscious – are attracted to price promotions. As Tesco, quoted in *The Grocer* earlier this year, confirms: 'bogofs and multibuy promotions have proved to be the most popular type of promotion for our customers.'[5]

So what is the impact on our health when we think we are picking up a bargain? Our researchers counted and classified all price promotions in all our surveyed stores – a total of 2,346 – with 462 in Morrisons alone – a feat which we think has not been attempted before. And it's not good news – we conclude that the majority of retailers are undermining public health goals. All, apart from M&S, had more than twice as many promotions for 'fatty and sugary' foods as for fruit and vegetables. There were over three times more in the Morrisons store surveyed and over four times in Somerfield – both retailers whose core customer base includes a significant proportion of lower-income shoppers.

A number of retailers told us of general intentions to promote healthier foods, but, as in 2004, we found the Co-op was the only company to have an explicit policy in respect of in-store price promotions. The Co-op says 25 to 30 per cent of its promotions are for 'healthier' foods. That still leaves the majority for less healthy foods – but it's a welcome start, particularly as the Co-op serves one of the highest proportions of lower-income shoppers of all the retailers we surveyed. The Co-op's leadership in this respect is one that we would like to see all companies following.

'Signpost' labelling

At the time of conducting this year's survey the FSA had not published its advice on a preferred option for 'signpost' labelling. Nonetheless, we found supermarkets and leading brand companies developing their own schemes independently of the FSA. Other companies told us they considered the responsible approach is to wait for the outcome of FSA research. We are pleased that many companies are eager to use 'signpost' labelling but agree that a proliferation of different schemes is confusing and unhelpful to consumers.

When we look again at retailers' and manufacturers' practices in 2006 we shall be able to comment more fully than we are able this year on which companies are best supporting their customers to make healthier choices through 'signpost' labelling.

Nutrition content of foods

One of our recommendations last year was for the FSA to develop food category targets for fat, saturated fat and sugar in addition to salt. We are pleased to note that the FSA has accepted this and is now bringing stakeholders together to take this forward. In future, we anticipate being able to measure retailers' practices and policies against such targets.

Future role for the NCC's Health Responsibility Index

Our report last year generated considerable interest not only from consumers and the companies we surveyed, but also from government and the responsible investment community, both of which are interested in benchmarking and monitoring companies' progress.

This has led us to the conclusion that the issue of monitoring and comparison between company practices is more important than ever – not only to benchmark practices but also as a means to highlight good practice and stimulate 'health promoting' competition between companies.

[4] *Tackling Health Inequalities: Status report in the Programme for Action*, Department of Health, August 2005

[5] 'Return of the Bogof', James Durston, *The Grocer*, 6 August 2005

The way forward

Alongside the launch of our findings to the general public, we shall continue to discuss opportunities for further improvements with retailers, the FSA and DoH. We also welcome the views of others on our approach.

Contact Sue Dibb: s.dibb@ncc.org.uk

Appendix 1 Our research methods

To measure retailers' progress towards the targets of our Health Responsibility Index, we used the same research methods as in 2004 with some minor modifications.

This year we:

- surveyed the top nine, rather than ten, retailers – following the takeover of Safeway by Morrisons;
- included 'economy' brand ranges in our survey;
- modified our in-store promotions indicator to measure the percentage of price promotions for fruit and vegetables;
- extended our indicator on customer information and advice to include company's free in-store magazines and customer helplines.

As in 2004, we commissioned the Food Commission to undertake indicator development and to conduct the in-store surveys.

In-store surveys took place during June 2005, with the exception of the Iceland survey, in July 2005. Subsequently, we wrote to retailers requesting details of relevant company policies. Summaries of company policies are provided in Appendix 2.

Our scoring system

For each indicator we score retailers out of ten – the score for products or practices achieving our 'target'. To be able to measure progress, we have used the same baseline and targets as in 2004. Our overall Health Responsibility Index score for each retailer is calculated by averaging the four key area scores.

Our scoring is based on what we found in stores in June 2005, and on product labels in June and July 2005. We recognise that some product data and practices may have changed since we undertook our survey.

Choice of products

We used the same sample of twelve 'standard' own-label products that we surveyed in 2004:

- 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.

These were chosen to represent a cross section of basic foodstuffs eaten regularly and in reasonable quantity by a large number of supermarket customers and to include product categories that the FSA has highlighted in its salt reduction approach.

As far as possible, we bought the same products in 2005 to those purchased in 2004. Where specific products were not found on sale in the surveyed store, these were purchased (where available) in London stores in July 2005 to ensure that indicators were calculated on as comprehensive a sample of products as possible.

In addition to 'standard' products, we also surveyed 'healthier' versions of the standard products where available, and this year included a survey of available 'economy' range products – found in all retailers except Marks & Spencer and Waitrose.

We also purchased examples of leading brands for each product category for illustrative comparison.

Choice of stores for inclusion in the survey

For each retailer we revisited the same store to allow comparisons between the 2004 and 2005 findings, with the exception of Iceland. In 2004 we did not include Iceland in several of the indicator measurements, and were not able to give an overall Health Responsibility Index rating due to the small sample of products that we were able to find. Iceland told us that it wished to be included in all aspects of our 2005 survey and in consultation with the company we chose a different branch (in the same geographical area) that offered a wider range of products than the one visited in the 2004 survey.

The nine stores surveyed are shown on the map on the right.

Measures of nutritional content

Salt

We have applied the same Health Indictor as in 2004 using the declared sodium content of a sample of ten 'standard' foods. For each product category we used the FSA's salt model 'target average' levels (2003) – the same 'target' we used last year. Since conducting our survey fieldwork the FSA has published a revised set of salt reduction 'targets' for consultation[6]. At the time of writing these had not been finalised. For this reason – and also to measure progress on salt reduction we have used the 2003 FSA figures as our 'target'.

We have used sodium data on 'healthier', 'economy' and 'leading brand' products to provide illustrative examples of comparative salt levels.

[6] 'Proposed targets for levels of salt in key food categories that contribute most to intakes', Food Standards Agency consultation, August 2005

Fat and sugar

As in 2004, we collected data on declared fat, saturated fat and sugar for our surveyed products. We have used this data to comment on comparisons between retailers and also between different ranges – 'standard', 'economy' and 'healthy'. Due to lack of food category 'targets' for these nutrients we have not included this element in our Health Responsibility Index scoring.

Measures of labelling information

For our survey this year we applied that same three indicators that we applied in 2004:

- Declaration of 'full 8' nutrients and translation of sodium into salt equivalent figure.
- Use of Guideline Daily Amounts (GDAs) on nutrition panels.
- Use of 'signpost' interpretative labelling.

Our scoring for these indicators was based on what we found on the labels of the twelve 'standard' and, where found, 'healthier' and 'economy' equivalent products collected for each retailer. By including 'economy' products in this year's survey, our sample was therefore slightly larger than last year.

As in 2004, we did not examine companies' use of nutrient claims such as 'high in fibre' or 'fat-free', or more general health claims stating or implying links between particular foods and health or diseases.

Measures of in-store promotions

The proportion of in-store price promotions for 'healthy' (fruit and vegetables) foods.

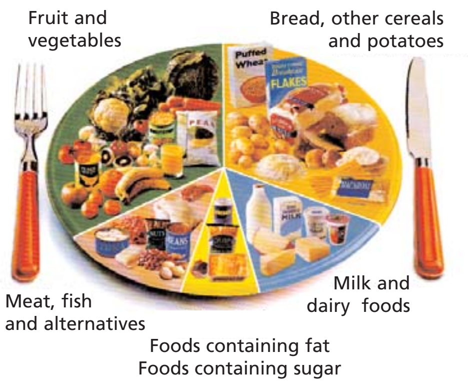
This year we modified this indicator to measure the extent to which in-store price promotions – such as price discounts and 'buy one get one free' multibuy-type offers – support the promotion of healthier foods. For practical reasons we limited our survey to determining the proportion that price promotions for fruit and vegetables – including fresh, frozen and canned – make up of the totality of food price promotions.

We set our 'target' for this indicator as 33 per cent - the percentage that we are recommended that fruit and vegetables should comprise in a healthy balanced diet – as illustrated in the FSA'S Balance of Good Health model, shown right. For comparison we also determined the proportion of price promotions in-store for 'fatty and sugary' foods which The Balance of Good Health recommends should comprise no more than seven per cent of a healthy balanced diet.

Surveyors recorded information about price promotions displayed in each store. This included own-label as well as branded price offers. We noted the type of price promotion (for example, 'buy one get one free' or other multibuy offer, price reductions, 'extra' product for the same price) but not the price that the product was offered for, nor the amount of the discount. We did not include end of shelf-life products sold at a reduced price; offers requiring purchase of a product to apply or collect tokens for a future discount or offer, or price discounts on alcoholic beverages or non-food items.

Presence of 'less healthy' snacks at the checkout

As in 2004, we measured how the supermarkets encourage impulse purchases through displays of confectionery, snacks and drinks at checkouts. 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



The Balance of Good Health
Food Standards Agency

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.

Measures of customer information and advice

As in 2004, this indicator is in two parts. This year surveyors collected and assessed retailers’ free magazines in addition to leaflets in-store to determine the availability of information and advice to customers on healthy eating.

This year, we also assessed retailers’ national ‘helplines’ - rather than in-store customer information desks. In an ‘anonymous shopper’ exercise our surveyors called national helplines to ask for information and advice about the 5 A Day message (the advice to eat at least five portions of fruit and vegetables per day) and salt and health. See right for the full list of questions.

Our score is based on our assessment of the availability of information on healthy eating available in-store through leaflets and magazines (possible five marks) and the provision of correct and helpful information and advice via customer helplines (possible five marks). We did not seek to include or assess information or advice available from company websites, but we did take a look at any web-links that helpline staff provided, to check whether the information was easy to access, and had addressed the questions asked.

Questions to retailers’ telephone helplines:

5 A Day

1. I’ve seen the phrase ‘eat 5 A Day’ on food in your shop. Can you tell me what 5 A Day means? (Note: If the supermarket employee did not know immediately, the surveyor prompted by saying, ‘I think I’ve seen it mainly on fruit and vegetables.’)
2. Have you any information on what foods that includes? (Note: If the supermarket employee had information easily to hand, this was noted. The surveyor also asked if further information could be sent by post or was available on the company website.)
3. Does it include frozen sweetcorn?
4. What about canned?
5. Have you any recipes for food that I can make as part of 5 A Day?

Salt and health

6. How much salt should my four-year-old eat each day?
7. Is that different to me?
8. I bought a sandwich that says 0.5g sodium per 100g – is that salt?
9. Is that high or low salt?

Appendix 2 Retailers' company policies

After publication of the 2004 survey, we met with each of the retailers to discuss the survey results and to learn more about how individual companies are taking forward the NCC's 20 action points for retailers. We also outlined our plans for repeating our survey to measure progress in 2005.

Following completion of our 2005 fieldwork we wrote to companies – as we did in 2004 – requesting details of company policies in our four key areas, specifically requesting information on targets and timeframes for their achievement. In addition, we asked for details of any relevant corporate social responsibility policies or other corporate commitments in relation to obesity/health and nutrition, including key performance indicators (KPIs).

The responses we received are summarised here.

Asda

Nutrition/salt

- Has been reducing salt across entire food range since 1998. Minimum salt is a requirement for all new product development.
- More recently Asda has extended focus to fat, saturated fat and sugar for children's and adults' food and drink. To February 2005 Asda made 550 fat, salt and sugar reductions from its foods.
- Have been reducing salt, fat and sugar from its 'Smart' economy range of foods.
- 'Good for You' low-fat healthy eating range has strict criteria for fat, saturated fat, salt and sugar and also a defined calorie target.

Nutrition labelling/information

- Company policy is to declare 'full-8' nutrition information and per serving where space permits. An additional box highlights fat, calories and salt per serving.
- All 'Good for You' products have clear front-of-pack fat content declaration.
- Asda is working closely with government and industry groups to develop a common, industry-wide approach to GDA and 'signpost' interpretative labelling. Therefore it has not developed a different approach because of potential confusion for consumers.
- Is phasing out 'percentage calories from fat'. GDAs have been added to some packs since 2002, but Asda has delayed national rollout of GDAs, pending results of FSA signposting research. Intends to support FSA signposting approach – providing it helps Asda customers. Is working with Institute of Grocery Distribution (IGD) to support industry-wide consensus on how best to declare GDAs.

In-store promotions

- Is conducting further trials of sweet-free checkouts.
- Promotions are being reviewed with a plan to increase the proportion of healthy offers.
- Supports 5 A Day, 'Fruit for Schools', 'Enjoy Fruit and Veg' campaigns with in-store events, local activity and consumer information.

Information & advice

- In-store activity includes cholesterol, diabetes and blood pressure testing with advice, in-store nurses and themed events including health tips, weight loss and healthier eating.
- Increasingly features health information and advice in leaflets and *Asda* magazine.

Asda communicates with its customers on health issues in a number of ways:

- National and local media (including press)
- Customer literature (health leaflets in store and from Customer Relations at head office, recipe cares, *Asda* and *Good for You* magazines, 'free-from' lists and factsheets)
- Healthy Living website
- Store tours with health professionals and local initiatives, including talks, store visits and exhibitions
- On-pack information and point-of-sale with year-round health messages
- School education projects linked to national curriculum including the 'Big Healthy Eat'.

CSR policy

Asda's CSR stance is to look after customers health by:

- Demystifying healthier eating, making it easy, accessible and affordable.
- Building trust through providing simple down-to-earth approaches with no fads, just everyday advice on how to make a difference without having to try too hard and without it costing too much.

Co-op

Nutrition/salt

Policies apply to all Co-op brands – whether 'value', 'standard' or 'premium' ranges.

- Co-op policy is to reduce salt by 20 per cent across Co-op brands in three to five years from September 2004. In addition, Co-op has committed to meet the (2003) FSA targets for salt in sandwiches, ready meals, pizzas, pies and pasta sauces (named by FSA as priority targets) by September 2006 and are on track to do so. Popular children's foods (for example, fish fingers, frozen nuggets and mini cheese and tomato pizza) have also been targeted and meet, or are below, FSA targets.
- Fat reductions: Co-op has continued to implement its policy of 20 per cent reduction in fat. Reformulated products have seen significant reduction in fat and salt. Awaiting FSA developments prior to finalising company approach.
- Sugar reductions: In absence of FSA directional steer, has committed to target sugar reduction in high-sugar savoury products. The company is wary of replacing sugar with artificial sweeteners as some consumers wish to avoid these additives. It does offer a range of low sugar/no added sugar and low-calorie options. Has chosen a trigger level of 20 per cent total sugars to identify high-sugar products. It welcomes FSA intervention in these areas.
- Has refined and extended the compositional criteria for 'Healthy Living' products. A maximum of three per cent fat applies to all products, except meat and poultry (maximum five per cent). Products must contain no more than 1.5 per cent saturated fat and contribute less then ten per cent energy from saturates. Maximum salt and calorie levels apply dependent on product category.

Nutrition labelling/information

- All products carry: full nutrition labelling, per 100g and per serving; give salt as well as sodium figures, carry high/medium/low descriptors for nutrients; carry front-of-pack flashes with amount of calories, fat and salt per serving; GDAs for calories, fat and salt.
- Appropriate products carry front-of-pack: 'Eat More' roundel to encourage consumption of certain categories of food, including starchy carbohydrates and oily fish; and the 5 A Day logo, indicating portions in a serving.
- Relaunched 'Healthy Living' brand highlighting the Calories, fat, saturates and salt per portion on front and leading faces of packs.This is clearer and bolder than the roundel previously used on these and standards Co-op brands. It extends front-of-pack declarations to include saturates.
- Signposting: Co-op has led the field on signposting and interpretative labelling with high/medium/low nutrient descriptors used on all Co-op brands since 1986. Awaiting the outcome of FSA research before developing further. Do not believe a proliferation of different signposting schemes is helpful to consumers.
- In-store healthy eating trial: In October 2004, Co-op conducted an in-store trial to establish the impact of nutrition information on shopping habits. The amount of calories, fat and salt and whether these were low, medium or high were declared on the shelf edge of some 300 products – both Co-op label and other brands – including biscuits, breakfast cereals, yogurts and desserts and cook-in-sauces. The trial enabled customer to make direct comparisons between different brands through highly visible information, supported by in-store information and advice.

The customer response to the new labelling was very positive with a high proportion of customers finding it helpful and clear. Many consumers claimed it would be likely to influence their purchasing patterns. However, product sales data was less conclusive, and confused by the impact of other in-store promotional activity. Sales of branded products supported some shift towards lower salt and lower fat products within the trial.

In-store promotions

- All promotions include 25 to 30 per cent healthy products. All stores provide a selection of fresh fruit and vegetables, including small stores. Fresh fruit and vegetables are regularly featured in press and TV advertising, comprising approximately 20 per cent of products featured.
- Supports the 5 A Day campaign, and portion sizes are included on all fruit and vegetable product press advertisements.
- Sweets at the checkout: prohibit the display of child-targeted products which are high in fat, sugar or salt (for example, confectionery, soft drinks, crisps, snacks and ice-cream) at traditional style supermarket checkouts. In convenience stores and 'quick payment' counters in larger stores such products may be displayed as part of the convenience range offering.
- Does not advertise high fat, sugar and salt products to children.

Information & advice

- Co-op highlights healthy eating advice in-store by helping consumers make healthy choices using various devices such as shelf-edge labelling, wobblers and banners.
- Have free customer care line which answers queries promptly. Co-op does not provide in-store help desks due to small size of most stores, nor have specialist and trained staff in-store to answer customer queries on diet and health.
- The Co-op undertakes a range of work in the community to encourage consumers to implement healthy eating advice.

Iceland

Nutrition/salt

- Iceland has an established nutrition strategy which addresses salt, saturated fat and sugar reduction, as well as increases in fibre, fruit and vegetables. Targets are based on government models and guidance.
- In 2004, salt reduction achievements were made in pizza, cooking sauce and ready meals. Salt levels in sausages, burgers, bread and morning goods, sandwiches, bacon and cooked meats are being reviewed in 2005. Category target levels for sodium are based on SACN and the FSA salt reduction model.
- A technical policy for Iceland brand suppliers outlines best practice for reductions in fat, saturated fats and sugar.
- Iceland 'Good Choice' and 'Kids Crew' ranges must meet specific nutrition criteria based on government recommendations.
- Iceland does not have a 'value' range.

Nutrition labelling/information

- All Iceland brand products are labelled with the 'full 8' nutrition information and salt, per 100g and per serving, as consumed.
- Calories, fat, saturates and salt are highlighted within the nutrition panel.
- 'Good Choice' products state the calories, fat and salt per serving on the front of packaging.
- Guideline Daily Amounts (GDAs) now appear on all Iceland 'Good Choice' healthy eating products and are being rolled out to other ranges.

In-store promotions

- Iceland supports 5 A Day. The official logo and portion indicator appears on all own-brand frozen and fresh vegetables and produce, and fruit juice.
- Iceland offers a variety of in-store promotions across different food groups.
- At least one checkout free from sweets.

Information & advice

- The Iceland website has been updated to include a healthy eating section.
- Store colleagues and the Iceland customer care team can assist customers with queries. Training material is provided for colleagues on nutrition and allergen labelling.

Marks & Spencer

Nutrition/salt

- M&S will continue to work towards improving the nutrition profiles of products across its range to assist customers who are increasingly aware of the importance of healthy eating.
- Salt: since 1998, M&S has been working to reduce the salt used in a wide range of foods. By 2005 had already achieved the British Retail Consortium's (BRC) 2009 salt reduction targets across all 15 categories. Now working towards tougher FSA targets and making good progress.
- Fat: making good progress on reducing total fat levels in everyday foods and move towards healthier types of fat. Working with FSA to develop targets. Intends to replace hydrogenated fats in all M&S foods as soon as possible – will have achieved this in over 90 per cent of products by April 2006. Has introduced omega-3 enriched eggs and milk.
- Sugar: will reduce amount of added sugars in foods that are eaten regularly. Working with FSA to develop targets.
- Fibre: aiming to increase fibre content of foods – increasing use of wholegrains, whole-wheat flour, fruit, vegetables and developing new fibre-rich ingredients.
- M&S 'Count-on-us' is a range of foods for customers who are dieting. All products are less than 3 per cent fat and have maximum calorie and salt levels based on the eating occasion. In 2005, M&S introduced Glycaemic Index (GI) information on 60 products. M&S will continue to review, update and expand the 'Count on us' range in line with customer preferences.
- M&S 'Eat Well 4 Kids' range of children's foods are nutritionally balanced for energy, fats, sugars and salt. Updating ready meals in October 2005 to include on-pack healthy eating messages.

Nutrition labelling/information

- M&S provides: full nutrition labelling; salt equivalent information; GDAs for fat, calories and salt for men and women per portion; and, where appropriate, 5 A Day information, except for a small minority of products where space does not permit.
- Labels highlight nutritional benefits such as low fat, high fibre and GI.
- M&S plans to extend GI labelling to the remainder of 'Count on us' products and all carrying 'Eat Well' logo.
- 5 A Day: M&S applies its own 5 A Day logo to fruit and vegetables, selected fruit juices and smoothies. Plans to extend to prepared meals, soups and desserts that are considered 'healthy' using FSA nutrient profiling model.
- Signposting: has introduced the 'Eat Well' sunflower to positively signpost the healthier option across a wide range of either naturally healthy foods, or foods that it is recommended we eat more of; and nutritionally-balanced foods. Currently around 20 per cent of all food carries 'Eat Well' logo (800 lines). M&S will be adding a further 100+ products by January 2006. M&S says the response from customers has been encouraging and has seen a significant change in shopping behaviour. It has a dialogue with

the FSA on the development of nutritional signposting.

In-store promotions

- Snacks at checkouts: has at least one non-confectionery till in each store. Developing attractive displays of healthier foods at till points – has successfully trialled 'healthy snacking' with dried fruit and nuts at checkouts in selected stores. Also developing healthier foods – such as fruit-based products – to replace some sugar based confectionery at tills.
- Character merchandising: has reviewed policy and will remove core character merchandise from tills. Children's confectionery products will be available from main confectionery section within the store.
- Promotes healthy eating messages such as 'Eat Well' and 5 A Day supported by point-of-sale material and price offers.
- Routinely feature an element of healthy foods, including fresh fruit and vegetables, chicken, new potatoes in this year's TV advertising campaigns.
- M&S support for Breakthrough Breast Cancer Awareness will have an 'Eat Well' tie-in in 2005.

Information & advice

- Has noted a huge increase in interest in food nutrition, diet and health in last two years. M&S aims to keep both employees and customers informed about the issues and action the company is taking.

For customers:

- has developed a website to provide a wide range of information on food and nutrition directly to customers.
- includes healthy eating features in most editions of 'Your M&S' customer magazine, as well as on its website.

For employees:

- runs features in employee magazine;
- gives presentations at store managers' conferences and other engagement opportunities';
- provides Monthly Health Tips include in-store communication (including support and awareness of FSA Salt Campaign, October 2005);
- is producing an extensive health and nutrition reference pack, available via the company intranet to help store colleagues to answer customers' questions;
- gives briefings with company nutritionists for customer services team to provide them with better information; and
- is considering how to best introduce a food, health and nutrition section to company induction training for food customer assistants.

CSR policy

- 2005 Corporate Social Responsibility Report included a significant section on the company's performance on food and nutrition. Distributed to employees and wide range of external organisations.

Morrisons

As last year, we did not receive a response from Morrisons despite a number of follow-up calls to our letter of request.

Sainsbury's

Nutrition/salt

- Salt: launched salt reduction initiative in 1999 to reduce salt content by ten to fifteen per cent. Further three-year strategy in 2004 has annual targets for reducing salt in sandwiches, pizzas, ready meals, soups and breakfast cereals. Also developing targets to cut salt in other product categories.
- Sainsbury's 'Be Good to Yourself' is undergoing a radical makeover in early 2006, including: strict criteria for fat, saturated fat, salt, total sugar and calories; and an update to reflect a healthy balanced diet rather than just low fat.
- Planning to improve healthy offer for families, with particular emphasis on children aged five and over. Current range, 'Blue Parrot Café' has strict standards including controlled salt and fat levels, restricted additives, and encouraging the use of fruit and vegetables.
- Basic 'economy' range is being extended and includes many healthier food lines such as fresh fruit and vegetables.
- 'Just Cook' ready to cook range of foods has healthy levels of fat, calories and salt and no artificial ingredients. 'Fresh to Cook' range includes fresh vegetables.

Nutrition labelling/information

- Provides full nutrition labelling on all products where space permits. Includes salt equivalents and, where space permits, GDAs.
- Signposting: in January 2005, Sainsbury's introduced its 'Wheel of Health' front-of-

pack, colour-coded signpost labelling. It is being rolled out across all own-brand categories in due course.

- 5 A Day: Sainsbury's has its own 5 A Day logo used on foods that contain at least one portion of fruit/vegetables per serving and which meet criteria for fat, saturated fat, sugar and salt levels.

In-store promotions

- No sweets at the checkout (in supermarkets) apart from at Easter and Christmas.
- Has pledged to promote healthier foods such as fish, lean meat and fruit and vegetables and to ensure that healthier choices are accessible and affordable.
- Active Kids: introduced in March 2005. Vouchers for every £10 spent in-store can be collected by schools and redeemed for sports and activity equipment. Bonus voucher given for every £5 spent on fresh fruit and vegetables. Has helped to drive a significant increase in sales of produce. Ended June 2005, but will restart in 2006.
- Has introduced several activities to encourage greater fruit and vegetable consumption by children: 'Sainsbury's Fruit in Schools' scheme, 'Fruitastic' store tours and features on fruit on the 'Taste of Success' education website.
- Has pledged to support the promotion of healthier lifestyles.

Information & advice

- Has produced a number of healthy living leaflets on healthy eating, food for children, 5 A Day, heart health, diabetes, carbohydrates, salt and food safety.
- Regional Food Advisers work within local communities to promote healthy eating. In June 2005 these were trained by Jamie Oliver and are now going into schools across the UK to help motivate and educate children to eat healthy food.
- Healthy eating activities in-store and within the local community include customer diabetes store tours, 'healthy eating for a healthy weight' store tours (linking in with local GPs), running MOT health checks for men, 'Eat 2B Fit' store tours for school children, healthy eating cookery demonstrations and colleague health training.
- 'Taste of Success' award scheme supports food studies and cooking in the curriculum. In January 2005 launched the 'Taste of Success "Get Active – Get Cooking"' challenge across the country.

CSR policy

Food and health is one of the key priorities identified in Sainsbury's Corporate Responsibility report. Sainsbury's aims to be industry leaders in healthy, safe, fresh and tasty products. Key performance indicators (KPIs) include extending the 'Wheel of Health' front-of-pack signposting to more own brand products, and setting rigorous targets for reducing salt, fat and sugar in own-brand products. (www.j-sainsbury.co.uk/crreport).

Somerfield

Nutrition/salt

- Salt: policy to match the FSA salt model over a period of five years.
- Fat: in discussions with the FSA. Support the development of fat and sugar models, as for salt. Current policy is to keep fat to the minimum consistent with the food in question. Also looking to reduce saturated fats and transfatty acids.
- Sugar: objective is to reduce sugar levels where appropriate and to question additions of sugar in all foods. Concerned about artificial sweeteners as an alternative.
- 'Good intentions': has reviewed range – now a maximum of three per cent fat, with controlled salt (as per the FSA model) and restricted additive lists. Due to relaunch in January 2006.

Nutrition labelling/information

- Continue to label full-8. 'Good Intentions' range carries GDAs for fat, energy and salt. Other ranges carry GDA information on salt, with the energy and fat levels highlighted in the nutrition panel.
- Signposting: awaiting outcome of FSA research and will then apply the outcome to own-label foods. Concerned about potential confusion to customers of different schemes.

In-store promotions

- Promotions: Include fresh fruit and vegetables, lean meats and healthy eating ranges in promotional offer. Fresh fruit and vegetables always appear as part of promotional offer every week. Healthy eating ranges feature at least twice a year.
- 5 A Day: support the 5 A Day message with information in produce sections and on own-label pre-packed foods, where appropriate. Has own 5 A Day logo but follows Department of Health guidance on portion size.
- Snacks at checkout: offers choice – some checkouts avoid confectionery, others do not. Where stores as small (the majority) confectionery is displayed at checkouts for space reasons.

Information & advice

- Continues to use *Somerfield magazine* (the third best-read magazine in the country) to encourage a healthy lifestyle. Includes regular articles on healthy eating and exercise. Considers magazine best way to communicate with customers – rather than leaflets.
- Does not have customer help desks. Information is available via store colleagues or from Somerfield website.

CSR policy

Somerfield's health policy is one of its CSR policies. The existing policies have been adopted but with the recognition that more needs to be done in this area.

Tesco

Nutrition/salt

- Salt: met British Retail Consortium (BRC) salt reduction targets two years ahead of schedule. 350 products now have lower salt levels. Will continue to reduce salt across product range guided by FSA salt modelling work and prioritised categories and raise awareness with customers on the importance of managing their salt intake.
- Fat and sugar: full scale review of the sugar and fat content of own-brand products. This year another 2,000 products will be reviewed for fat, saturated fat, sugar and salt levels.

Nutrition labelling/information

- Signposting: has developed its own system. Amounts of calories, salt, fat, saturated fat and sugar in a serving are stated on the front of packs, also indicating how much (percentage) of the GDA this comprises. First labels were introduced in April 2005 and rolled out to more products each month.
- Glycaemic Index (GI): continues to promote GI labelling to help customers identify those foods that will keep them feeling fuller for longer. Labels indicate which products with a low or medium GI, helping dieters as well as customers with diabetes.
- 'Healthy Living' brand highlights fat, salt, calorie and sugar contents and foods fortified with vitamins and minerals.

In-store promotions

- Magazines and leaflets: actively supports 5 A Day and salt reduction messages, and general healthy eating advice through magazines, leaflets and price promotions.
- More space devoted to healthy products.
- Price promotions: continuing to work to make healthy food more accessible to all our customers. Has extended 'Value' range to include over 30 fresh fruit and vegetable lines, as well as other healthy products such as pasta and skinless chicken.
- Supported 5 A Day with on-pack labelling and supporting information since 2001.
- Company policy is not to have confectionery products at checkouts in larger format Tesco superstores and Extras.

Information & advice

- Has produced leaflets on healthy eating.
- Tesco's 'Healthy Living Club' provides its 220,000 members with information and encouragement on how to get fit and stay healthy, as well as providing benefits such as discounts on gym membership and money-off vouchers for healthy products.
- Staff training: have put in place new training and support for staff to improve their knowledge on health and nutrition.

CSR policy

In 2005 Tesco added a key performance indicator on healthy living to its CSR performance indicators: to have 2,000 products with new nutritional signposting, and to increase the number of Healthy Living Club members from 220,000 to 500,000.

Waitrose

Nutrition/salt

- Waitrose says it adopts nutrition standards appropriate for the range and specific product types. It provides specific targeted guidance on fat, sugar, salt and additive use to improve the nutritional profile of processed products in line with nutrition targets outlined in export reports.
- Waitrose aims to deliver continues improvement of dedicated healthy eating ranges, Perfectly Balanced and Healthier, which adhere to strict nutrition and ingredient criteria.
- Suppliers are provided with year on year targets for salt reduction in specific categories.

Nutrition labelling/information

- Waitrose provides clear, consistent and transparent nutrition labelling to assist customers in making appropriate choices. Ensure the robustness of 'on pack' information/claims through validation.
- Introduced a new format of on-pack nutrition information in August 2005 and will be rolled out on all own label products. This highlights the amount of calories, fat, saturates, salt and sugars per serving.

In-store promotions

- Waitrose encourages greater intake of 'super foods' such as fruits and vegetables which have high nutritional value and are an essential component of healthy lifestyles.
- Ensure that evidence based nutrition messages underpin promotional activities with respect to children and healthy eating ranges.

Information & advice

- Leaflets: have a range of leaflets and fact sheets including Healthy eating, diabetes, weight management, glycaemic index and omega 3 fats. These are also available through the Waitrose website.
- Full nutrition information for all own label products – both packaged and sold loose is available in a folder at customer service desks in all branches. It is available on request to any customer and sent to 100 health professions.
- Offers web-based nutrition information and advice to help customers with specific dietary requirements, to help schools with nutrition education and to provide general healthy eating advice.
- Nutrition Advice Service offers a fully quality nutritionist to respond to customer queries via email, letter and phone. The service was trialled online at the beginning of 2005 and will be reintroduced in September 2005.