

# Superlist UK Environment 2022

## PART 2: SUPERMARKETS AND THE PROMOTION OF MEAT



# Acknowledgments

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# Supermarkets encourage meat consumption through promotions

## EXECUTIVE SUMMARY

- The UK's largest supermarkets have pledged their support to combat climate change, yet continue to encourage the consumption of meat products. Overconsumption of meat significantly contributes towards climate change.
- Morrisons and Asda use multi-buy strategies most often to increase the sale of meat products. Approximately three quarters of meat promotions, examined in the study, encourage the buying of more than one product. Research suggests that multi-buys encourage the buyer to purchase more than they usually buy, more than other types of promotion.
- While Tesco also promotes the consumption of meat, the majority of promotions are not of the multi-buy type. Sainsbury's does not use multi-buy promotions at all but continues to incentivise the purchase of meat using price reductions.
- From October 2022 new UK legislation will restrict promotions on food and drinks high in fat, sugar and salt (HFSS) in supermarkets. Some processed meat products will be subject to restriction, including meats that are breaded or prepared in sauce.

## Research overview

We examine how supermarkets use price promotions to encourage the consumption of meat and fish and how transparent supermarkets are about the origin and production methods of these products.

For five weeks in 2021 (August 20 - September 24) we analysed the promotions for meat products on the websites of the UK's largest supermarkets: Asda, Morrisons, Sainsbury's and Tesco. During this period, each supermarket's online store was visited weekly.

Questionmark's research approach is to extract all product information available on a supermarket's website into a database. Using this database we can methodologically compare supermarkets, and uncover detailed insight into trends and differences between different companies.

Within this analysis, promotions were categorised as either a 'multi-buy' or a 'price reduction' promotion. To determine the origin and certification of meat products, we analysed the text-based information that is available on each product's webpage.

This project's research methodology (Questionmark, 2021a) was made available on the 20th August 2021 on the website of [Superlist](#).





# FOREWORD

Our diet is responsible for an increase in lifestyle-related diseases such as obesity, diabetes and cardiovascular diseases. At present, half of the world's habitable land is used for agriculture, with most of this used to raise livestock for dairy and meat. And 14.5% of greenhouse gas emissions globally come from animal farming, with around a quarter coming from food production as a whole. Therefore, it is crucial that all actors, including food producers, supermarkets and policymakers, do more to support a healthier and more sustainable food environment.

In the UK, nine out of ten people visit supermarkets on a weekly basis, giving these companies significant influence over consumer choices. Product assortment, price, promotions, shop layout, and even the recommended recipes within store magazines, all greatly influence consumer behaviour. Supermarkets need to step up and shift their strategies and actions towards buying and selling healthy and sustainably produced food.

This Superlist project seeks to understand supermarkets' role in encouraging the purchase of meat and fish in the UK. Our question is: are supermarkets supporting less and better meat?

This study shows that supermarkets have ample opportunities to lead the way towards a more sustainable food system. For me, this confirms a pressing need for greater transparency across supermarket practices. I hope the findings of this report are received as a constructive challenge, and that our recommendations to the relevant parties — policymakers and supermarkets — are useful to guide and encourage future actions in this area.

**CHARLOTTE LINNEBANK**

Director, Questionmark Foundation

**Questionmark**





# MEAT & PROMOTIONS

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# Supermarkets increase meat consumption through promotions

Supermarkets are in an influential position to encourage healthier and sustainable food choices. Promotions are a powerful tool to nudge purchasing decisions. In this study we examined how the Big Four British supermarkets promote meat and fish sales using multi-buys and other price reductions.

- Supermarkets significantly encourage customers to consume more meat. Asda and Morrisons in particular extensively promote meat products through multi-buy promotions. Research in the UK suggests promotions are effective at encouraging people to purchase more of the promoted food type.
- High meat consumption is a significant contributor to climate change. Therefore, the use of these promotions contradicts the responsibility supermarkets hold and their commitments to helping to combat climate change.

## Background

In the UK, meat consumption is almost twice the global average. The food we eat already carries a huge environmental footprint, and meat and dairy are a significant contributor towards greenhouse gas emissions, water use, pollution, land use and biodiversity loss. A recent article published in Nature concluded that a global shift to a 'flexitarian' diet is needed to keep climate change 'under the 2C global warming target that governments have signed up to' (Springmann et al., 2018).

## Impact of promotions

Promotions can influence a consumer's decision to purchase, then eat, more meat or fish. Research revealed that in 2018, in the UK, 34% of food and drink expenditure was spent on promoted products. In many of these cases, this allows the shopper to spend less money. For example, if the products were to be purchased anyway or stored for later use.

However, promotions can also result in shoppers simply buying more food. For fresh meat, 14% of the volume bought on promotion constitutes a net increase in sales: shoppers buy more meat than they regularly buy and go through it more quickly than usual. These figures were even higher for poultry (18% additional volume purchased) and especially high for fish (22% additional volume, (PHE, 2020).

## Multi-buys

Compared to price reductions, multi-buy

promotions provide a stronger incentive for people to buy more of the promoted product. Research shows that up to 27% of the volume of product bought within a standard '2-for-1' promotion should be considered as a net increase of the entire product category (PHE, 2020). In other words: over a quarter of the products bought on a 2-for-1 promotion are extras, not compensated by a decrease in sales of similar products. The impact of multi-buys lacks significant research for animal products, but the general trend makes it relevant to distinguish this type of promotion in the analysis.

In October 2022 the use of multi-buy promotions for products high in Fat, Salt or Sugar (HFSS) will be prohibited (UK Government, 2021). We also give an indication of the intended effect of this measure on multi-buy promotions for meat.

## Research method

For this study, we focussed on two food promotions in particular: The use of multi-buy promotions (for example "3 for the price of 2", "3 for £10", or "buy one get one free") and the use of other price promotions, such as plain price reductions.

We analysed the promotions for all meat or fish products during the five week research period. Subsequently we classified each promotion as either multi-buy or price reduction.



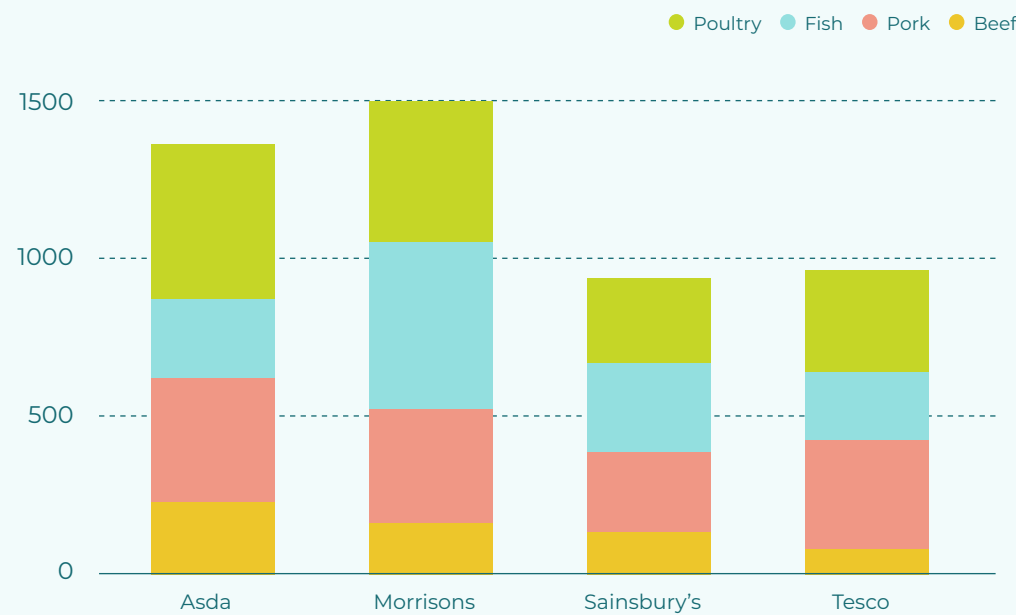


Figure 1: meat and fish promotions for each of the four supermarkets, divided by animal type.



Figure 2: share of multi-buys in total meat and fish promotions

## Results

Figure 1 shows the total number of meat or fish promotions for each of the four supermarkets, divided by animal type, over the five weeks.

During the research period, Morrisons (1490) and Asda (1352) ran considerably more promotions for meat or fish than Tesco (948) and Sainsbury's (933). Also in proportion to the total number of food promotions, meat promotions are more prevalent at Morrisons and Asda (12% and 11% of their total promotions respectively) than at Sainsbury's (7%) or Tesco (9%).

Due to the link between multi-buy promotions and increased consumption, it is relevant to analyse the type of promotion used. These results are shown in Figure 2.

Figure 2 reveals that Asda and Morrisons run more multi-buy promotions for animal products than price reduction promotions. Almost three in every four of their meat promotions only holds for customers purchasing multiple items. Secondly, Sainsbury's policy since 2016 to stop using multi-

buy promotions continues (Sainsbury's, 2016). Moreover, many multi-buy promotions for products high in fat, salt or sugar (from now on: HFSS products) will soon become prohibited by the Food (Promotion and Placement) Regulation.

**THESE FINDINGS SHOW  
THAT SUPERMARKETS  
ENCOURAGE THE PURCHASE  
OF MORE MEAT, WHICH  
CONTRADICTS THEIR CLIMATE  
COMMITMENTS.**

In order to assess the effect of this regulation on meat promotions, we need to analyse the share of products in the research period that would disappear as a result of the forthcoming legislation. For all multi-buy promotions of products in meat and fish categories (represented by the red

segments in figure 2), we determined whether the promoted product was HFSS according to the Nutrient Profiling Model (PHE, 2018). Subsequently we determined whether the promoted HFSS products belong to one of the food categories in scope of the legislation.

Some processed meat products will be subject to the new restrictions, including meats that are breaded or prepared in sauce.

## Discussion of results

These findings show that supermarkets encourage the purchase of more meat, which contradicts their climate commitments (see text box on next page). Asda and Morrisons and, to a lesser extent, also Tesco, are propping up unsustainable levels of meat consumption through their extensive use of multi-buy promotions.

An argument for multi-buy promotions is that they would support lower-income consumers. With the rising cost of living, saving any amount can relieve considerable pressure on families.

However, recent studies from the UK indicate that multi-buys - in contrast to other types of price promotions - do not save the average consumer money. Instead, people who buy multi-buys spend £14 more on average annually (PHE, 2020). Policy makers already have a tool at their disposal to put a stop to this practice. The Food (Promotion and Placement) Regulation provides a framework that could be used to ban all multi-buy promotions for meat products high in fat, salt or sugar. In the research period these products accounted for the large majority of meat multi-buys. Yet due to the exemption of meat in the legislation, only 1% of the meat multi-buys found in this research would actually be banned.

There are calls for the legislation to cover all (HFSS) meat products, but in the meantime supermarkets can support sustainable eating by pricing vegetables, wholegrains, nuts, seeds, fruit and pulses competitively including the use of promotional tools. Sainsbury's ban on multi-buys has already shown that companies do not need to wait for legislation changes to start making a difference.

Nearly two out of five meat multi-buys promote HFSS products. The remaining 62.2% of multibuys promoted products that were not particularly high in fat, salt or sugar. The upcoming Food Regulation aims to reduce the promotion of HFSS products. However, meat products as a category are exempt from the legislation, unless the meat or fish is breaded or battered. The result of this exemption is that only 1% of the meat and fish promotions that we encountered in the research period would become prohibited by the new Food Regulation. All other HFSS promotions, accounting for 36.8% of the promotions we registered, will still be permitted. This amounts to over 160 multi-buy promotions for HFSS meat products each week.

- HFSS meat multi-buys, not covered by legislation
- HFSS meat multi-buys, soon prohibited
- Other meat multi-buys, not covered by legislation

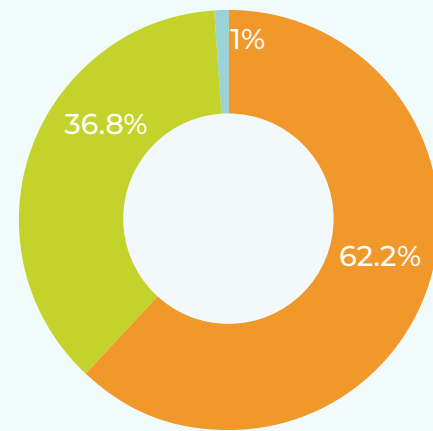


Figure 3: meat and fish multi-buys and Food Promotion Regulation

## Recommendations to supermarkets

*Supermarkets should formulate a policy of limiting promotions that prop up unsustainable diets. We give a few suggestions for concrete measures, in order of effectiveness:*

- Limit the number or frequency of promotions for meat and fish;
- Ban multi-buy promotions for red and processed meat. The Eatwell guide advises eating less red and processed meat (no more than 70g per day) and more plant proteins;
- Ban multi-buy promotions for meat and fish in general;
- Ban all promotions for meat and fish.

## Climate Change on the Agenda of Supermarkets

In their 2021 annual reports, all four supermarkets stress that Climate Change is a big global problem, in which supermarkets have an important part to play.

Morrisons sustainability report: "As a leading retailer we know we must play our part, which is why we are taking action in our own operations and within our wider value chain to reduce our carbon footprint." (Morrison, 2021)

Roger Burnley, CEO of ASDA: "Climate change represents a threat to human safety on an unparalleled scale and presents very material risks to our food chain; we are committed to playing our part in accelerating solutions which protect and regenerate our environment." (Asda, 2021)

Sainsbury's Sustainability report: "As the UK's second largest food retailer, we also know we have

a role to play in helping to navigate customer choices and supplier behaviour towards more sustainable choices, helping to preserve our limited natural resources. A key priority for our business is to develop and deliver healthy and sustainable diets for all, therefore we aim to provide customers with the information, incentives and rewards to encourage healthier and more sustainable food choices." (Sainsbury's, 2021)

Tesco Sustainability report: "We recognise climate change as the biggest environmental threat the world faces (...) As we strive to provide our customers with affordable, healthy, sustainable food, we are also taking action on important issues including climate change and restoring nature." (Tesco, 2021b)

## Recommendations to policy makers

*To policy makers we recommend the following steps, complementary to the forthcoming legislation:*

- Include all unhealthy (HFSS) meat and fish products in scope of the Food (Promotion and Placement) Regulation, at least putting a stop to multi-buy promotions for the most unhealthy types of meat; or
- Include all meat and fish products in scope of the Food (Promotion and Placement) Regulation, since increasing their consumption is undesirable from both an environmental and a health perspective;





# MEAT & TRANSPARENCY

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# Meat: origin and transparency

- *Supermarkets rarely provide information on methods of production. And not all supermarkets are transparent on the origin of their meat products. With Asda 53% of meat products lack origin labelling.*
- *In order to set measurable targets to sell 'less and better' meat and dairy, supermarkets need to have details on the origin and method of production.*
- *This information could also provide customers with reliable information to make more informed food choices.*

There are two types of transparency notable of distinction. Firstly, supermarkets need to be transparent at company level. They should disclose their targets towards selling 'less and better' meat and dairy, and measure their performance against those targets. Secondly, supermarkets should provide transparency at product level by providing customers with reliable information on how an animal has been reared. Transparency at product level helps people to make more informed food choices.

## Research method

The Food Foundation's Plating up Progress 2021 report notes "a more widespread move by supermarkets to setting targets for, and disclosing, sales-based data for healthy vs. unhealthy food, but this is not mainstream and the methodologies are inconsistent." (PUP 2021)

Building on the work of the Food Foundation, we analysed all meat category products that were on offer during the research period. We then assessed product information, focussing on origin and production methods, from the information available on the online product page.

## Production method

Information on production methods is traditionally communicated through certification logos or husbandry terms such as 'free range'. Often products include multiple certifications and standards. To avoid a double count, we only considered the first mentioned standard in the following order:

1. Organic
2. Soil Association
3. Pasture for Life (does not occur in our dataset)
4. Pasture Fed (does not occur in our dataset)
5. Red Tractor
6. RSPCA
7. Free Range
8. Free to Roam

## Origin

For an assessment of origin information, we looked for statements of origin on the product pages in the online store. A country flag (British flag, Spanish flag, etc) on the product page was interpreted as referring to the country of origin. We assume that the origin mentioned regards the country where animals were reared, yet we did not assume the declaration of a country of slaughter or processing was the same as origin.

We have included meat products from England, Scotland, Wales and Northern Ireland to derive from the 'UK'. The Republic of Ireland and all other European countries were categorised as the 'EU'. All specified countries outside of the UK and the EU were considered 'outside EU'. Products containing meat sourced from both within and outside of the UK were categorised as 'EU'. We used the same logic for products where multiple origins were mentioned, for example 'produced from British or New Zealand lamb' were categorised as 'outside EU'. If meat was produced outside of the UK, but was processed or packed within the UK, the origin was considered 'EU' or 'outside EU'.

As a second indicator to assess supermarket actions towards supporting a more sustainable diet, we assessed transparency around meat products. According to the "Better by Half" roadmap (Eating Better, 2021), transparency on the origin of animal products and ingredients is one of the five most important actions to be taken by retailers.



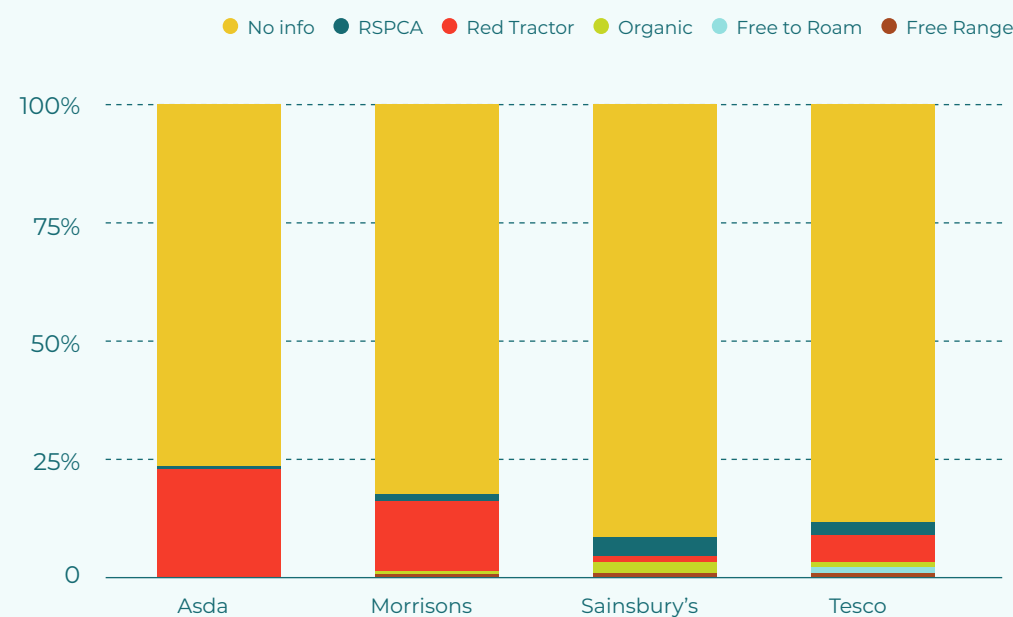


Figure 4: availability of information on production method for meat

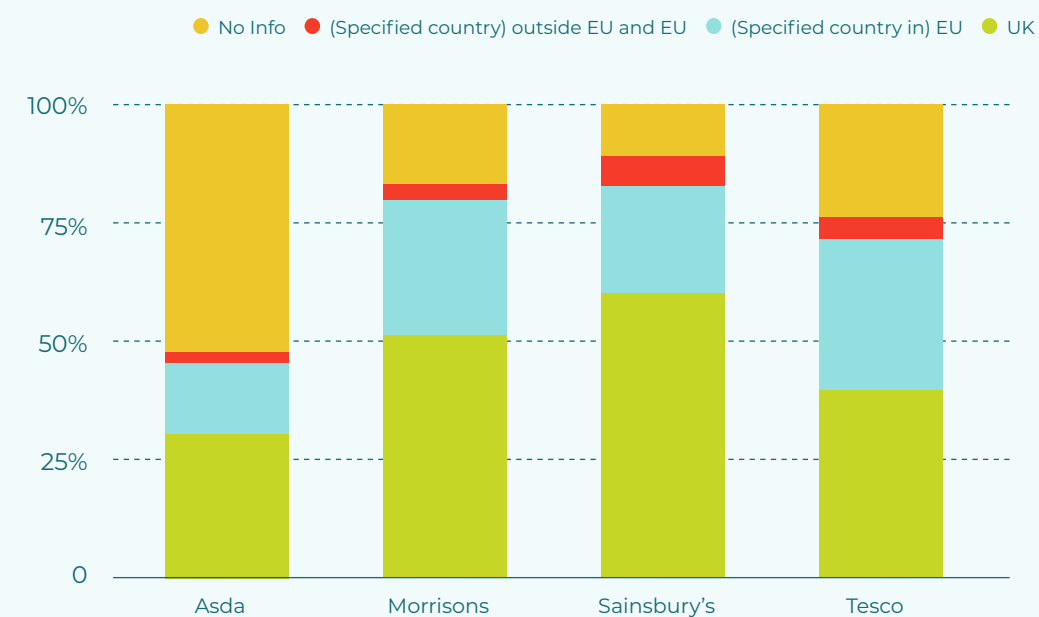


Figure 5 shows the inclusion of origin information on meat products.

## Results

Figure 4 shows the availability of production information for meat products. Red Tractor is the most used certification (10% of total offer in four supermarkets).

Asda is the most transparent across the four supermarkets, with almost a quarter of its products referring to the Red Tractor standard. Whilst Sainsbury's (8%) and Tesco (12%) have a low transparency across their total meat offer, but have more "better" meat on offer.

However, the absence of a certification or claim does not mean the product fails to meet those standards. It might be that an online store does not list all available certifications that are listed on a physical package. A manual analysis of the physical packages was beyond the scope of this research. However, a sample check of two hundred products suggests that at Morrisons and Tesco the coverage of products with Red Tractor might be around 15 % higher.

Additionally, the supermarket might not offer the information at all - whether on the physical package or online - even if the product meets certain standards. This could be the case for a large number of products that are Red Tractor assured. Many

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supermarkets provide information at portfolio level for this standard, instead of per individual product. Better meat (such as organic, free range, pasture-

fed and RSPCA Assured) require their label to be shown in the packaging. It is unlikely that the supermarket would not disclose the information on the product page.

Figure 5 shows the inclusion of origin information on meat products. Sainsbury's was the most transparent in communicating country of origin, with 89% of products including provenance information.

Almost half of the meat products across the largest four UK supermarkets were labelled to originate from the UK (46%). Just under a quarter (24%) of products were labelled as deriving from the 'EU', sometimes indicating a specific country (mostly Spain). Five per cent originated from a country outside the UK or European Union.

### *Umbrella logos*

In some cases different standards are brought together under one umbrella certification or statement. Many products on Tesco's shelves are branded with a: 'Tesco Welfare Approved'.

According to Tesco's webpage these products 'comply with a recognised farm assurance standard, such as Red Tractor (or an in-country scheme compliant with both EN ISO/IEC 17065:2012 certification requirements and benchmarked for equivalence with Red Tractor)' (Tesco, 2021a). Out of these products, nine had the Red Tractor logo on the packaging, but did not mention the scheme in the text based information. For reasons of readability we have marked these products as Red Tractor in the graph above.

Similarly we have found eight products with the 'Room to Roam' label, which, according to Tesco's webpage on animal welfare are 'sourced from British farms which are assured to RSPCA Assured standards alongside Red Tractor's Enhanced Welfare Module' (Tesco, 2021a). These products are included in our analysis as Red Tractor and RSPCA certified.

Customers are best supported with a limited and consistent set of standards that are clearly defined and third-party verified.



### Organic meat

Organic meat is significantly absent at both Asda and Morrisons. As discussed above, considering the higher price of organic meat and the value of an “organic” label, it can be assumed that most organic products are labelled as such and are included in this analysis.

At the time of writing this report, Asda offered consumers one organic chicken product and Morrisons offered two organic chicken products.

## Recommendations to supermarkets

- Disclose sales of weighted figures on the origin and production methods of your animal products. Set targets and measure performance against them.
- For product transparency, only use certifications that are third party verified and well known by the general public.
- Review sourcing policies to ensure own brand meat and dairy products meet, at least, the ‘better’ level in line with the Eating Better alliance’s Sourcing Better framework (Eating Better, 2021).

## Recommendations to policy makers

- Require all products to state the method of production on the packaging.
- Encourage companies to use the same set of standards for animal welfare. This will in turn serve the transparency and the efficiency of the market as a whole.
- Improve minimum legal standards to ensure better animal welfare, responsible antibiotic use and improved environmental outcomes.







## CONCLUSIONS & RECOMMENDATIONS

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Although the UK's largest supermarkets have pledged their support to combat climate change, they continue to encourage the purchase of meat products. Asda and Morrisons in particular extensively promote meat products through multi-buy promotions, including 'buy one get one free', otherwise known as '2 for 1'. Recent research in the UK has shown that these promotions lead to increased consumption of the promoted product. Meat consumption is a significant contributor to climate change. Therefore, the use of these promotions contradict the responsibility supermarkets hold and claim for helping to combat climate change.

# Recommendations to supermarkets

Based on the findings of this report, supermarkets should consider the following:

- Implement a comprehensive strategy to support sustainable diets. We give a few suggestions for concrete measures, in order of effectiveness:
  - ⇒ A limit to the number or frequency of promotions for meat and fish;
  - ⇒ A ban on multi-buy promotions for red and processed meat. The Eatwell guide advises eating less red and processed meat (no more than 70g per day) and more plant proteins;
  - ⇒ A ban on multi-buy promotions for meat and fish;
  - ⇒ A ban on all promotions for meat and fish;
- Disclose sales weighted figures on the origin and production methods of your animal products. Set targets and measure performance against them.
- For product transparency, only use certifications that are third party verified and well known by the general public.
- Review sourcing policies to ensure own brand meat and dairy products meet, at least, the 'better' level in Eating Better's Sourcing Better guide.

# Recommendations to policy makers

To policy makers we recommend the following steps, complementary to the forthcoming legislation:

- Include unhealthy (HFSS) meat and fish products in scope of the Food (Promotion and Placement) Regulation, at least putting a stop to multi-buy promotions for the most unhealthy types of meat; or
- Include all meat and fish products in scope of the Food (Promotion and Placement) Regulation, since increasing their consumption is undesirable from both an environmental and a health perspective; and
- Require all products to state the method of production on the packaging.
- Encourage companies to use the same set of standards for animal welfare. This will in turn serve the transparency and the efficiency of the market as a whole.
- Improve minimum legal standards to ensure better animal welfare, responsible antibiotic use and improved environmental outcomes.





# DATA QUALITY & ANALYSIS

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In this annex we give an overview of our approach to ensuring data quality. Data collection happens, for the most part, automatically. These processes are monitored, and checked for inconsistencies. At several points manual sample-based checks were done.

# DATA COLLECTION

## Products

On a weekly basis, all food products (for human consumption) on the online stores were collected automatically. Products were detected by systematically browsing the website through the categories. We did not include products that can only be found through a name search.

Most products re-occurred in our searches every week. However, some products were removed from, or added to, the assortment during the research period. Hence the total number of products registered over the whole period may be slightly higher than the number of products on offer at any given moment.

## Product data

Product data is retrieved from the webpage as-is. This includes name, nutrition table,

ingredient list, certifications, country of origin, etc. In case a product data changes during the research period, the most recent version is used for analysis.

When data is missing, we may use data from a different online store to complete it, but only if both products can be identified as identical. For the measurement of transparency in chapter 2, this was omitted, so that the specific retailer's transparency on origin and certification would be measured.

## Promotions

Each product that has a promotion indication ("1 + 1 free", "20% off", discounted price, etc.) is considered to be a promotion in that week. A promotion that runs for four weeks will thus be counted as four different promotions for the same product.

Subsequently all promotions that require the purchase of multiple items (in order to benefit from a price reduction) are marked as MUP (multiple unit promotion). This includes promotions of the type:

- 2 for 1
- 1 + 1 free
- Any 3 for £3

# ANALYSIS

## HFSS

For each product, we determined if it was in-scope or out-of-scope for the legislation, and if the product was HFSS or not based on the Nutrient Profiling model. For more explanation of this part of the analysis, we refer to part I of this study.

## Meat and fish

For a categorisation of products as meat or fish, we used the supermarket's categorisation

as point of departure. We assume that all products with meat or fish as a main ingredient are categorised as meat or fish. For broad supermarket categories like Top rated, Eco-friendly, New, etc. products were manually categorised.

## Completeness and correctness

Data quality consists of completeness and correctness, each with several aspects. Figure 6 shows the most important results of both.

	Sample size	Promotions Indicator 3	Transparency Indicator 4
<b>Completeness</b>			
Processing	200	not applicable	98%
Correctly excluded products	200 <sup>1</sup>	100%	96%
HFSS	all meat & fish	93%	not applicable
<b>Correctness</b>			
Correctly included products	200 <sup>1</sup>	98% <sup>2</sup>	100%
Promotion kind	200 <sup>1</sup>	100%	not applicable
Meat/fish kind	200 <sup>1</sup>	100%	100%
Certification	200 <sup>1</sup>	not applicable	96%
Origin	200 <sup>1</sup>	not applicable	94%
HFSS	50	92%	not applicable

Figure 6. Data quality results per indicator. All checks were done by taking a random sample with manual verification (except HFSS completeness, which was automated).

<sup>1</sup> samples were distributed evenly over all four retailers; the percentage for each retailer is higher than or equal to the percentage shown in this table.

<sup>2</sup> sample size for meat and fish each, the total sample size for this check is 400.







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# Superlist: project background

As supermarkets significantly influence consumers' food purchases, they are key players for enabling healthier and more sustainable food habits. Through the findings and recommendations from our Superlists, Questionmark Foundation seeks to show how supermarkets can seize this opportunity.

*Superlist UK Environment is the second UK study from a series of similar studies taking place across Europe. The first study, 'Superlist UK Health 2021' was published in December 2021 (Questionmark, 2021b).*

Superlist is a multi-year research project that provides insight into what supermarkets are doing to drive healthier and more sustainable food and drink purchases. Superlist has developed a tool to monitor and track the actions supermarkets take to influence healthier and sustainable consumer choices. This tool identifies which companies are leading the way and which are lagging behind - and what they can each do to improve their position.

Superlist was published for the first time in the Netherlands in 2020. This first edition focused on [Healthy](#) eating, and was followed by [Superlist Green](#) (environmental sustainability) in 2021. [Superlist Animal Welfare](#), published also in the Netherlands in December 2021, examined the actions supermarkets have taken to foster better Animal Welfare.

## Superlist UK

This report, published in two parts, reveals the results of a UK pilot, and focuses on the

promotional strategies used by the four largest UK supermarkets - Asda, Morrisons, Sainsbury's and Tesco.

In the first part of this study (Questionmark, 2021b), we analysed how these promotions supported healthier eating habits - using the Nutrient Profiling Model and the Food Promotions and Placements Regulation as analytical frameworks. The current report covers the second part of this study.

## About Questionmark

Questionmark Foundation is a European research institute. It intends to stimulate public debate around healthy and sustainable diets by providing facts, figures, and evidence-based recommendations. Questionmark Foundation is governed by an independent board whose members have no commercial interest in the food industry. Questionmark does not receive any funding that is directly or indirectly related to the British retail or food industry. Our integrity policy can be accessed [here](#).



# Questionmark

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