FOOD COMPANIES' COMMITMENTS AND PRACTICES ON FOOD ENVIRONMENTS AND POPULATION NUTRITION IN BELGIUM: A DETAILED ASSESSMENT

Company assessments and recommendations using the Business Impact Assessment on obesity and population nutrition (BIA-Obesity)

BELGIUM 2021

Further details available at:
https://www.informas-europe.eu/bia-obesity-europe/

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SUMMARY

Overview

Obesity and diet-related chronic diseases are major public health problems in Belgium

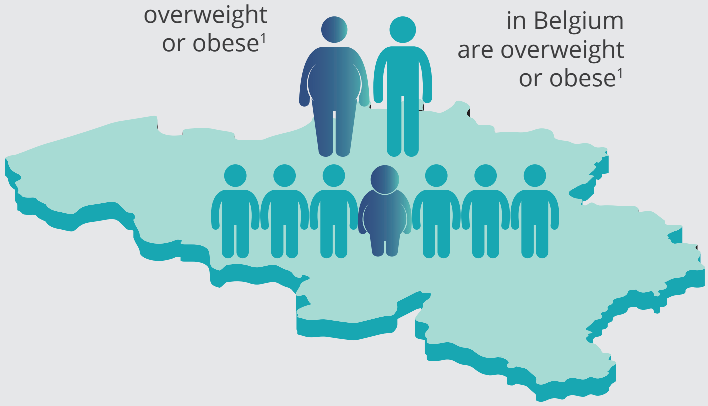
Overweight and obesity contribute significantly to rates of disease (cancers, diabetes, heart disease, strokes) and death in Belgium. This has a high cost to the economy, including large impacts on the health care system and productivity. **Unhealthy food environments** are one of the major drivers of obesity and diet-related chronic diseases. Actions from the government, the food industry and society all contribute to the healthiness of food environments.

As one of the key actors, the food industry has an important role to play in creating healthier food environments.

IN BELGIUM

1 out of **2** adults are overweight or obese[1]

1 in **7** adolescents in Belgium are overweight or obese[1]



Project aims

This project aims to contribute to efforts to improve the healthiness of Belgian food environments for obesity and chronic disease prevention by assessing **transparency, comprehensiveness and specificity of commitments** as well as practices related to obesity prevention and population nutrition, by the major Belgian food companies. The objective was to highlight, in the Belgian context, where food companies are showing some leadership, identify best available practice examples, identify areas for improvement, and make specific recommendations tailored by policy domain, sector and company.

The BIA-Obesity (Business Impact Assessment on Obesity and Population nutrition) has been developed by **INFORMAS** *(International Network for Food and Obesity/Non-communicable Diseases Research, Monitoring and Action Support)*, a global network of researchers that benchmarks food environments in over 40 countries worldwide. The methods were based on the Access to Nutrition Index (ATNI)[2], which benchmarks food company commitments, performance and disclosure practices at the global level. The BIA-Obesity assesses company commitments across **six key domains**. The most prominent food companies in Belgium (N=31) were selected for assessment across four sectors: **packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets and quick service restaurants**. The assessment included commitments until *October 2020*. For practical reasons, the time frame depended on data availability.

Process

Publicly available information on commitments was analysed for all 31 selected food companies. This included an analysis of Belgian and European/international company websites, annual reports, media releases, relevant industry association and government websites. The project team liaised with companies to supplement and validate the publicly available information. Furthermore, key performance indicators were calculated for the different sectors using available secondary data. Companies were assessed and ranked, highlighting examples of best practice, key areas for improvement and recommendations.

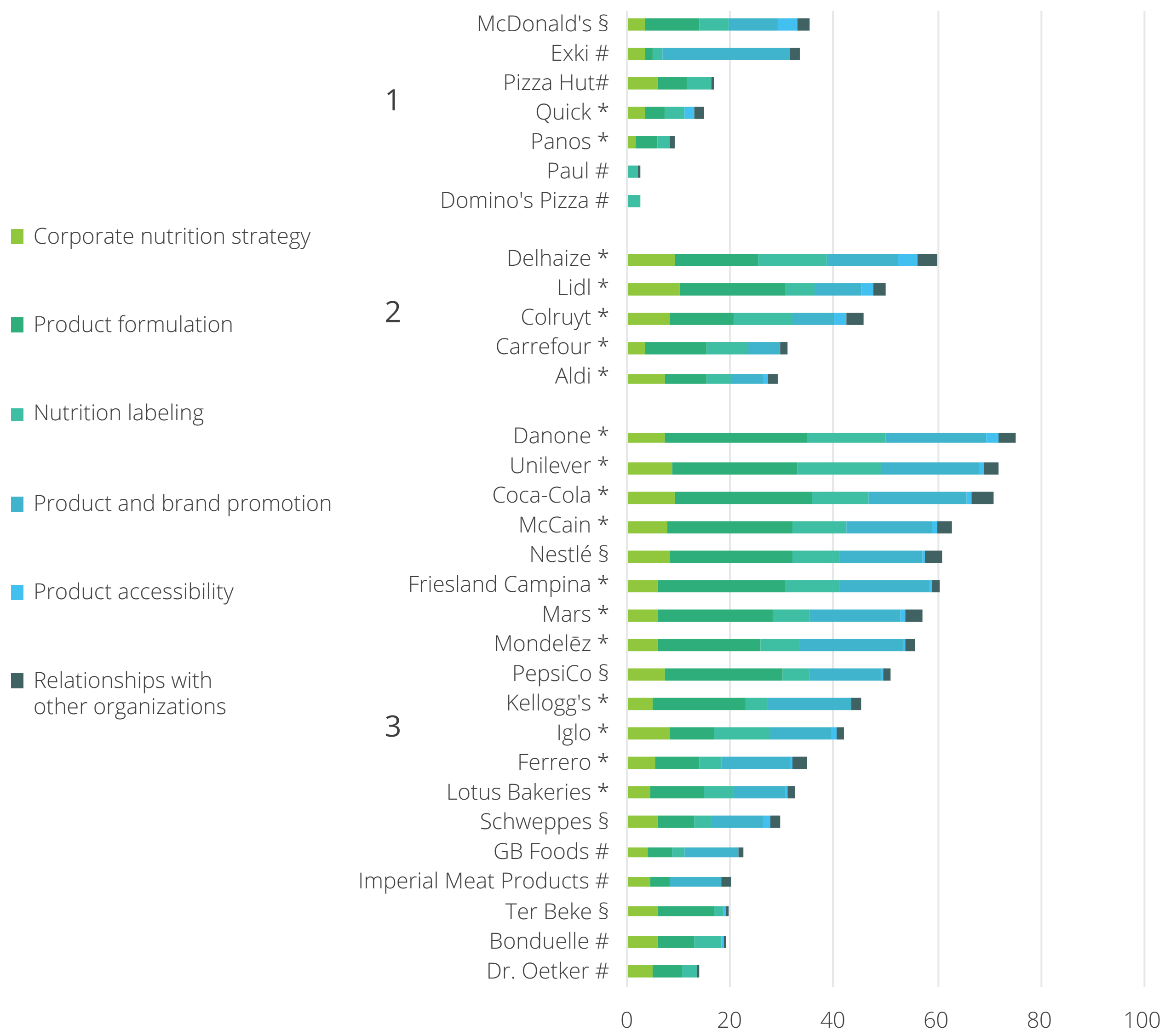
Domains assessed and weighting

Domain	Packaged food & beverage manufacturers	Quick service restaurants	Super-markets
STRAT: Corporate population nutrition strategy	10%	10%	10%
FORM: Product formulation	30%	25%	25%
LABEL: Nutrition labelling	20%	15%	15%
PROMO: Product and brand promotion	30%	25%	25%
ACCESS: Product accessibility	5%	20%	20%
RELAT: Relationships with other organizations	5%	5%	5%

1. Belgian Health Interview Survey 2018. **2.** https://www.accesstonutrition.org/

Company commitments on obesity and population nutrition in Belgium 2020

The summary dashboard of overall scores for the transparency, comprehensiveness and specificity of food company commitments by sector and food company can be found below.



Business Impact assessment on Obesity and Population Nutrition (BIA-Obesity), Belgium 2020 – Overall and domain-specific scores for 1. Quick service restaurants, 2. Supermarkets, 3. Packaged food and non-alcoholic beverage manufacturers.

** Full engagement with the process (N=18); # Declined participation (N=8); § Accepted participation, but contributions not received in time (N=5); For # and §: Assessment of commitments was based on publically available information only.*

Belgian food companies demonstrated some commitment to improving population nutrition, but much stronger action is needed across sectors and across BIA-Obesity policy domains. The best performing domain was *'Corporate nutrition strategy'* while the worst performing domain was 'Product accessibility'. The overall scores ranged from 2% to 75%, with a median overall score of 35%. The median overall score was 15% for quick service restaurants, 46% for supermarkets and 45% for packaged food and non-alcoholic beverage manufacturers. About 58% (N=18) of the selected companies fully engaged with the BIA-Obesity process and provided feedback and validation in time. The median overall score for those companies significantly increased from 34% (scoring based on publically available information) to 51%. For the other companies, the assessment was based on publically available information only.

SUMMARY

Company practices on food formulation, labelling & marketing in Belgium 2020

For each sector, for several of the BIA-Obesity domains (in particular product formulation, nutrition labelling & product & brand promotion), in addition to scoring the commitments, a selection of key performance indicators were calculated, dependent on available data. A summary of those indicators by sector can be found below.

Packaged food and non-alcoholic beverage manufacturers

BIA-OBESITY DOMAIN	PERFORMANCE INDICATOR(S)	YEAR	BEST PERFORMING COMPANY	WORST PERFORMING COMPANY
PRODUCT FORMULATION	*Full company food product portfolio:*	2018		
	• Mean (standard deviation) salt content[1] (g/100g)		Danone : 0.2 (0.3) & Friesland Campina: 0.2 (0.3)	Imperial Meat Products: 4.4 (0.6)
	• Mean (standard deviation) total sugar content (g/100g)		McCain: 0.6 (0.4)	Ferrero: 43.2 (16.1)
	• Mean (standard deviation) saturated fat content1 (g/100g)		Bonduelle: 0.3 (0.4)	Ferrero: 14.1 (6.4)
	• Mean (standard deviation) energy content (kj/100g)		Coca-Cola: 119.5 (109.4)	Ferrero: 2139.1 (219.7)
	• Median Nutri-Score		Bonduelle, McCain: A	Several companies: E
	• % of products with Nutri-Score A and B		Bonduelle: 100%	Ferrero & Imperial Meat Products: 0%
	• % of products with Nutri-Score D and E		Bonduelle, McCain, Ter Beke: 0%	Ferrero & Imperial Meat Products: 100%
	• % of products that are ultra-processed		McCain: 2.2%	Several companies: 100%
NUTRITION LABELLING	*Full company food product portfolio:* % of products with Nutri-Score displayed on the front-of-pack	2019	Danone: 34% Iglo: 34%	Most companies: 0%
PRODUCT AND BRAND PROMOTION	*Full company food product portfolio:* % of products not-permitted to be marketed to children according to the World Health Organisation Regional Office for Europe nutrient profile model (WHO-Model)	2018	Bonduelle: 11.6%	Several companies: 100%

1. Excluding Coca-Cola and Schweppes which only sell non-alcoholic beverages.

Quick service restaurants

BIA-OBESITY DOMAIN	PERFORMANCE INDICATOR(S)	YEAR	BEST PERFORMING COMPANY	WORST PERFORMING COMPANY
PRODUCT FORMULATION	*Full company food product portfolio:*	2020		
	• Mean (standard deviation) salt content (g/100g)		Domino's Pizza: 0.4 (0.2)	Panos: 0.9 (0.5)
	• Mean (standard deviation) total sugar content (g/100g)		Domino's Pizza: 4.4 (6.4)	Paul: 11.0 (12.6)
	• Mean (standard deviation) saturated fat content (g/100g)		McDonald's: 2.7 (3.0)	Panos: 4.3 (4.3)
	• Mean (standard deviation) energy content (kj/100g)		McDonald's: 806.9 (578.6)	Panos: 1040.6 (456.7)
	• Median Nutri-Score		All companies: C	All companies: C
	• % of products with Nutri-Score A and B		Domino's Pizza: 48.1%	Quick: 25.3%
	• % of products with Nutri-Score D and E		Domino's Pizza: 13%	Quick: 48.3%
PRODUCT AND BRAND PROMOTION	*For meals and food portfolio online:* % of foods and meals not-permitted to be marketed to children according to the WHO-Model	2020	Domino's Pizza: 58.2%	Quick: 92.2%
	Outlet density around schools in Flanders: Proportion of total outlets within 500m road network distance from primary schools in Flanders	2020	McDonald's: 30.6%	Domino's Pizza: 78.7%
	Proportion of total outlets within 500m road network distance from secondary schools in Flanders		Quick: 20.0%	Panos: 75.5%

SUMMARY

Supermarkets

BIA-OBESITY DOMAIN	PERFORMANCE INDICATOR(S)	YEAR	BEST PERFORMING COMPANY	WORST PERFORMING COMPANY
PRODUCT FORMULATION	*Full company food product portfolio:*	2018		
	• Mean (standard deviation) salt content (g/100g)		Aldi: 0.8 (1.0)	Delhaize: 1.1 (2.6)
	• Mean (standard deviation) sugar content (g/100g)		Carrefour: 10.2 (16.4)	Aldi: 15.7 (20.5)
	• Mean (standard deviation) saturated fat content (g/100g)		Colruyt: 4.6 (7.2)	Lidl: 5.7 (7.6)
	• Mean (standard deviation) energy content (kj/100g)		Carrefour: 1029.7 (767.1)	Aldi: 1216.7 (797.5)
	• Median Nutri-Score		Carrefour, Colruyt, Delhaize and Lidl: C	Aldi: D
	• % of products with Nutri-Score A and B		Colruyt: 40.9%	Aldi: 26.3%
	• % of products with Nutri-Score D and E		Colruyt: 39.1%	Aldi: 55.2%
	• % of products that are ultra-processed		Colruyt: 43.8%	Aldi: 63.0%
NUTRITION LABELLING	*Full own-brand food product portfolio:* • % of products with Nutri-Score displayed on the front-of-pack	2019	Delhaize: 30%	Most companies: 0%
PRODUCT AND BRAND PROMOTION	*Full own-brand food product portfolio:* % of products not permitted to be marketed to children according to the WHO-Model	2019	Colruyt: 64.3%	Aldi: 82.0%
	All food products: % of promotions for food in circulars: • that are ultra-processed • for fresh fruits and vegetables • with promotional characters	2019-2020	Lidl:43% Aldi:18% Colruyt:0.7%	Colruyt: 62% Colruyt: 4% Carrefour: 9%

Performance indicators for other BIA-Obesity domains, such as 'Food accessibility', will be collected in a next iteration of the BIA-Obesity Belgium. Currently, no suitable data were available for this BIA-Obesity domain.

Commitments versus performance for the different sectors in Belgium 2020

There were no associations found between scores for transparency, comprehensiveness and specificity of commitments and performance metrics, neither overall, nor by policy domain ('Product formulation', 'Product and brand marketing'). This means that companies with better commitments do not necessarily have healthier product portfolios or stronger marketing practices. In the future, it will be important to monitor changes over time in those performance metrics, as well as collect a larger set of performance metrics, in order to evaluate the size of efforts undertaken by food companies to improve their practices, alongside their commitments.

Key recommendations

Some commitments by food companies are in place in Belgium for some BIA-Obesity policy domains, including:

All sectors
- General commitments to improve population nutrition on national websites and some reporting on these commitments

Packaged food and non-alcoholic beverage manufacturers and supermarkets
- Some reformulation to reduce sodium, sugar, saturated fat and energy levels in selected food categories
- Committing to implement the Belgian Government endorsed Nutri-Score on packaged food and beverage products as well as online/on the shelf in-store (the latter only for supermarkets)

Quick Service Restaurants
- Providing nutrition information about foods and meals online

The following recommendations are made to stimulate stronger action by food companies across sectors to improve food environments and population nutrition in Belgium:

Corporate population nutrition strategy
1. *Prioritise population nutrition as part of the company's overall corporate strategy, including SMART (Specific, Measurable, Achievable, Relevant and Time bound) objectives and targets, appropriate resourcing and regular reporting against objectives and targets*
2. *Link the Key Performance Indicators of senior managers to nutrition targets in the corporate strategy*

Product formulation
1. *Commit to SMART targets on sodium, sugar, saturated fat and energy reduction across the product portfolio based on context-specific benchmarks by food category*
2. *Use the Nutri-Score to guide future efforts on product development and reformulation*

Nutrition labelling
1. *Support a European wide implementation of the Nutri-Score front-of-pack labelling system*
2. *Commit to labelling products with nutrition and health claims only when products are healthy according to an independently developed nutrient profiling system*
3. *Disclose energy content of foods and meals on the menus in-store (for quick service restaurants)*

Product and brand promotion
1. *Develop a comprehensive marketing policy that applies to children up to the age of 18 years*
2. *Use the World Health Organisation Regional Office for Europe nutrient profile model to define food products not-permitted to be marketed to children (i.e. unhealthy products)*
3. *Eliminate the use of promotion techniques with strong appeal to children (e.g., cartoon characters, interactive games) on non-permitted (i.e. unhealthy) food products across media and settings*

Product accessibility
1. *Support evidence-informed government policies such as a tax on sugar-sweetened beverages*
2. *Make a commitment to increase the proportion of healthy food products in the overall company portfolio*

Relationships with other organizations
1. *Publish all relationships with other organizations and funding for external research on the Belgian website*
2. *Disclose all political donations in real time, or commit to not making any political donations*

There is considerable room for improvement of the commitments for most companies.
The conversion of commitments into practice needs further evaluation and monitoring.

TABLE OF CONTENTS

Unhealthy diets and obesity are leading contributors to poor health in Belgium

Obesity and diet-related diseases are major public health problems in Belgium[1]. Belgians consume about one third of their energy from ultra-processed food products[2]. One in two Belgian adults and one in seven adolescents are now overweight or obese[3]. Overweight and obesity contribute significantly to rates of disease (cancers, diabetes, cardiovascular disease, strokes) and death. This has a high cost to the economy, including large impacts on the health care system and productivity.

Improved diets are critical for sustainable development

Improving population nutrition represents an important step in achieving the United Nations Sustainable Development Goals (SDGs). Nutrition is a component of all 17 SDGs [4], and can be directly linked to performance targets of several SDGs, including:

- SDG 2 - No hunger and reducing malnutrition in all its forms
- SDG 3 - Good health and wellbeing
- SDG 12 - Responsible consumption and production

The food industry has an important role to play in preventing obesity and improving population diets

Tackling obesity and improving population nutrition requires a comprehensive societal response, including government policies, community support, and wide-scale action from the food industry. The World Health Organization (WHO) has identified a number of actions that the food industry can take to improve population nutrition and create healthier food environments [5], such as:

- Reformulating products to reduce nutrients of concern (sugar, saturated fat, trans fat, sodium).
- Ensuring that healthy and nutritious choices are available and affordable to all consumers.
- Restricting marketing of foods high in sugars, sodium and saturated fats, especially those foods aimed at children and teenagers.
- Providing consumers with clear, easily understood nutrition information and evidence-based interpretive food labels.

Supporting companies to improve their commitments and practices on nutrition

The Business Impact Assessment Obesity and Population Nutrition (BIA-Obesity) has been developed by the International Network for Food and Obesity/Non-communicable Diseases (NCDs) Research, Monitoring and Action Support (INFORMAS) [6] and is used for the first time in Belgium with the main purpose of providing support to food companies to improve both their commitments and practices related to obesity prevention and population nutrition. Similar initiatives (e.g. Access to Nutrition Index, Oxfam Behind the Brands) have shown it is possible for such improvements to be made through regular monitoring and increasing accountability of industry actors.

Phase 1 of the BIA-Obesity includes a scoring of commitments in regards to transparency, comprehensiveness and specificity. Phases 2 investigates the performance of companies (i.e. healthiness of overall product portfolio, food marketing practices) and associations between commitments and performance for different BIA-Obesity domains. The BIA-Obesity should be repeated every couple of years to track progress for the four industry sectors in Belgium.

1. www.healthdata.org/belgium
2. https://link.springer.com/article/10.1007/s00394-018-1870-3
3. Belgian Health Survey 2018
4. Global Nutrition Report 2017: Nourishing the SDGs. Bristol, UK: Development Initiatives.
5. World Health Organization. Global Strategy on Diet, Physical activity and Health, 2004
6. www.informas.org

METHODS

Study aims

This study assessed the largest Belgian food companies on their commitments and practices related to obesity prevention and population nutrition. The study included four industry sectors: packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets and quick service restaurants. The objective was to highlight where Belgian companies are demonstrating leadership in relation to obesity prevention and nutrition, and to identify areas for improvement. The study is part of a broader initiative (INFORMAS) to assess company policies, disclosure practices and performance across different countries globally. This project is part of the Science and Technology in Child Obesity Policy project 1, which received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 774548.

Assessment of commitments

Food company commitments related to obesity prevention and nutrition were assessed using the BIA-Obesity (Business Impact Assessment on Obesity and population nutrition) developed by INFORMAS 2, a global network of public health researchers that monitors food environments in over 40 countries worldwide. These methods were adapted from the Access to Nutrition Index (ATNI) that benchmarks the nutrition-related commitments, performance and disclosure practices of global food and beverage manufacturers 3. The BIA-Obesity tool 4 includes sector specific indicators, that are tailored to the country context. Commitments were included up to **31 October 2020.**

THE PROCESS USED TO COLLECT, VERIFY AND ASSESS THE COMMITMENTS IS DETAILED BELOW.

1. Select companies for inclusion in the BIA-Obesity assessment
2. Collect preliminary data on commitments (from publicly -available sources) related to each indicator for all selected companies
3. Liaise with company representatives to refine and supplement policy inforrmation
4. Assess the commitments of each company using the BIA-Obesity assessment criteria
5. Prepare prioritised recommendations for each company
6. Privately feed results back to each company along with company scorecard and benchmarking against other companies
7. Publicly-release results, including individual company and sector performance

ASSESSMENT OF COMPANY COMMITMENTS TOOK INTO ACCOUNT FOUR KEY CRITERIA:

- Transparency/ disclosure
- Commitment relevancy to the Belgian context
- Comprehensiveness
- Specificity

1. https://www.stopchildobesity.eu/ **2.** www.informas.org **3.** www.accesstonutrition.org
4. Full methods and indicators of the BIA-Obesity are available at: https://www.informas-europe.eu/bia-obesity-europe/

Domains of the BIA-Obesity

The BIA-Obesity considers commitments across six key policy domains related to population nutrition. In each domain, the **transparency, comprehensiveness and specificity** of commitments were assessed. Two researchers conducted the scoring independently and discrepancies were solved by discussion. The score in each domain was weighted to derive an overall score for the BIA-Obesity out of 100. Although many of the indicators are the same across sectors, there are also differences. For example, some indicators might not be applicable for a certain sector (e.g., commitments to reduce saturated fats for non-alcoholic beverage manufacturers) or some indicators are sector-specific (e.g., commitments on confectionery free check-outs for supermarkets or free drink refills for quick service restaurants).

	Domain	Policy area	Examples of key indicators
A	**Corporate population nutrition strategy**	Overarching policies and commitments to improving population nutrition and addressing obesity	• Commitment to nutrition and health in corporate strategy • Reporting against nutrition and health objectives and targets • Key Performance Indicators of senior managers linked to nutrition targets
B	**Product formulation**	Policies and commitments regarding product development and reformulation related to nutrients of concern (i.e. sodium, saturated fat, trans fat, added sugar) and energy content	• Targets and actions related to the reduction of sodium, saturated fat, trans fat, sugar and portion size/energy content across portfolio • Engagement with government-led initiatives related to product formulation (e.g., the Convention for a Balanced Diet)
C	**Nutrition labelling**	Policies and commitments regarding disclosure and presentation of nutrition information on product packaging and online	• Commitment to implement the Nutri-Score across the product portfolio • Provide online nutrition information • Use of nutrition and health claims on healthy products only
D	**Product and brand promotion**	Policies and commitments for reducing the exposure of children and adolescents to promotion of 'less healthy' foods	• Broadcast and non-broadcast media policy • Use of marketing techniques that appeal to children and adolescents • Sponsorships, in-store promotion practices, and products featured in catalogues • Only advertise or display 'healthy' sides and 'healthy' drinks in (children's) combination meals
E	**Product accessibility**	Policies and commitments related to the accessibility (including availability and affordability) of healthy compared to 'less healthy' foods	• Increasing the proportion of healthy products in the product portfolio • Support of fiscal policies (e.g. a tax on sugar-sweetened beverages) • Pricing and discounting strategies • Check-outs free from unhealthy items • Not provide free refills for sugary drinks
F	**Relationships with other organizations**	PPolicies and commitments related to support provided to external groups (e.g., professional organisations, research organisations, community and industry groups) related to health and nutrition	• Disclosure and transparency of relevant relationships • Accessibility of relevant information • No political donations or declaration of those in real-time

METHODS

Weightings by domain

The weightings indicate the relative importance of the company policies in each of the six domains and have been derived from discussions with international food policy experts within INFORMAS. The weightings are slightly different from sector to sector, as the relative importance of certain domains (i.e. product accessibility as the main example) may be higher for certain sectors (i.e. supermarkets and quick service restaurants) than for others (food and non-alcoholic beverage manufacturers) since different actions are possible.

BIA-Obesity Domain	Packaged food and non-alcoholic beverage manufacturers	Quick service restaurants	Supermarkets
STRAT: Corporate population nutrition strategy	10%	10%	10%
FORM: Product formulation	30%	25%	25%
LABEL: Nutrition labelling	20%	15%	15%
PROMO: Product and brand promotion	30%	25%	25%
ACCESS: Product accessibility	5%	20%	20%
RELAT: Relationships with other organizations	5%	5%	5%

Assessment of performance

For some of the BIA-Obesity policy domains, a set of key performance indicators was selected to assess company's practices on population nutrition. The selected indicators, as well as the sources where the data were derived from and the years, are presented in the table below by sector and BIA-Obesity domain. For the domains on *'Corporate population nutrition strategy'* and *'Relationships with other organisations'*, no performance indicators were included. For the domain *'Product accessibility'* no performance data were available at the time of assessment. For the other BIA-Obesity domains, specific indicators were included, dependent on data availability and feasibility of the assessment. An overview of the different performance indicators can be found below.

SECTOR	BIA-Obesity Domain	Performance indicator(s)	Data sources	Years
PACKAGED FOOD AND NON-ALCOHOLIC BEVERAGE MANUFACTURERS				
	Corporate population nutrition strategy	/	/	/
	Product formulation	*For full product portfolio and selected food categories:* √ Mean (standard deviation) salt content (g/100g) √ Mean (standard deviation) total sugar content (g/100g) √ Mean (standard deviation) saturated fat content (g/100g) √ Mean (standard deviation) energy content (kJ/100g) √ Median Nutri-Score √ % of products with Nutri-Score A and B √ % of products with Nutri-Score D and E √ % of products that are ultra-processed	Nutritrack branded food composition database Belgium	2018

SECTOR	BIA-Obesity Domain	Performance indicator(s)	Data sources	Years
PACKAGED FOOD AND NON-ALCOHOLIC BEVERAGE MANUFACTURERS				
	Nutrition labelling	*For full product portfolio:* % of products with Nutri-Score displayed on the front-of-pack	Pictures of all food products with Nutri-Score on the front-of-pack in-store	2019
	Product and brand promotion	*For full product portfolio and for selected food categories:* % of products not-permitted to be marketed to children according to the World Health Organisation Regional Office for Europe nutrient profile model (WHO-Model)	Nutritrack branded food composition database Belgium	2018
	Product accessibility	/	/	/
	Relationships with other organisations	/	/	/
QUICK SERVICE RESTAURANTS				
	Corporate population nutrition strategy	/	/	/
	Product formulation	*For meals and food portfolio online:* √ Mean (standard deviation) salt content (g/100g) √ Mean (standard deviation) total sugar content (g/100g) √ Mean (standard deviation) saturated fat content (g/100g) √ Mean (standard deviation) energy content (kJ/100g) √ Median Nutri-Score √ % of meals with Nutri-Score A and B √ % of meals with Nutri-Score D and E	Websites	2020
	Nutrition labelling	/	/	/
	Product and brand promotion	*For meals and food portfolio online:* % of foods and meals not-permitted to be marketed to children according to the WHO-Model *Outlet density around schools:* Proportion of outlets within 500m road network distance from primary schools (Flanders only) Proportion of outlets within 500m road network distance from secondary schools (Flanders only)	Websites Locatus food retail database	2020 2020
	Product accessibility	/	/	/
	Relationships with other organisations	/	/	/

SECTOR	BIA-Obesity Domain	Performance indicator(s)	Data sources	Years
SUPERMARKETS				
	Corporate population nutrition strategy	/	/	/
	Product formulation	*For full own-brand product portfolio and for selected food categories:* √ Mean (standard deviation) salt content (g/100g) √ Mean (standard deviation) total sugar content (g/100g) √ Mean (standard deviation) saturated fat content (g/100g) √ Mean (standard deviation) energy content (kJ/100g) √ Median Nutri-Score √ % of Nutri-Score A and B √ % of Nutri-Score D and E √ % of products that are ultra-processed	Nutritrack branded food composition database Belgium	2018
	Nutrition labelling	*For full own-brand product portfolio:* % of products with Nutri-Score displayed on the front-of-pack	Pictures of all food products with Nutri-Score on front-of-pack in-store	2019
	Product and brand promotion	*Full product portfolio and for selected food categories:* % of products not permitted to be marketed to children according to the WHO-Model *All food products:* % of promotions for foods that are ultra-processed % of promotions for fresh fruit and vegetables % of promotions with promotional characters	Nutritrack branded food composition database Belgium Supermarket circulars	2018 2019-2020
	Product accessibility	/	/	/
	Relationships with other organisations	/	/	/

For packaged food and non-alcoholic beverage manufacturers and supermarkets (own-brand products), the healthiness of the product portfolios was analysed using the data from the Nutritrack branded food database 2018. Pictures of all food products available in Carrefour, as well as Lidl and Aldi were taken and the nutritional information was registered in the database. For Delhaize, nutritional data on own-brand products were received from the retailer and for Colruyt, web scraping was used to gather the nutritional data. The nutritional content of the product portfolios was analysed per food category.

Data were not weighted for sales as no sales data were available. The food products available on the Belgian market in 2018 were classified within eleven broad categories, based on the FoodSwitch categorisation system ('Bread & bakery products', 'Cereal & grain products', 'Confectionary', 'Convenience Foods', 'Dairy', 'Edible oils & emulsions', 'Fruits & Vegetable products', 'Meat and Fish products', 'Non-alcoholic beverages', 'Sauces' and 'Savoury Snack Foods'). For this project, alcoholic beverages, infant formula and baby foods were excluded. Product categories comprised the following types of food and beverage products:

Product category	Subcategories
Bread & bakery products	Bread, cake mixes, muffins, pastries, biscuits
Cereal & grain products	Breakfast cereals, couscous, noodles, pasta, rice, flour, baking soda
Confectionary	Chocolate- and sugar- based confectionery, chewing gum, lollies, sugar and sweeteners, protein & diet bars
Convenience Foods	Pizza, salad, ready meals, prepared sandwiches and soup, meal kits, diet drink mixes (meal replacements)
Dairy	Cheese, cream, prepared desserts, ice-cream, milk, yoghurt, coconut milk, soy milk
Edible oils & emulsions	Butter, margarine, cooking oil
Fruits & Vegetable products	Dried fruit, nuts, fruit bites and bars, jam, syrup, vegetables, fruits, potatoes, herbs, spices, seasoning
Meat and Fish products	Fish, meat, tofu, kebabs, sausages, bacon
Non-alcoholic beverages	Juices, water, cordials, soft drinks, milk flavourings
Sauces	Vinegar, salad dressings, meal-based sauces, nut-based spreads, dips, table sauce, gravies
Savoury Snack Foods	Crisps, popcorn, pretzels, snack packs, extruded snacks

When comparing manufacturers per product category, only the companies selling more than one product within this category were taken into account.

For quick-service restaurants, the nutritional information per 100g was obtained from the national brand websites in 2020, where possible. For Domino's Pizza, McDonald's and Panos the nutritional information per 100g could be obtained from the national brand websites. On the Belgian website of Paul the available nutritional information was limited. As a result it was chosen to complete the nutritional information for Belgium using the information available on the French website for the same products. For Quick no nutritional information was available per 100g and no portion sizes were specified on the national website, so an online table with nutritional information from 2017 was used. On the website of Exki and Pizza Hut no nutritional information was available per 100g and portion sizes were not defined. As a result the product portfolios of Exki and Pizza Hut could not be analysed.

The healthiness of the entire portfolios or menus of all selected food companies was analysed using the Nutri-Score, which is the official front-of-pack labelling system in place in Belgium since April 2019. The proportion of products with Nutri-Score A, B,C,D and E was determined, as well as the median Nutri-Score across the company's portfolio or menu. For Ter Beke only 2 food products were included due to the fact that most foods are produced for sale outside of supermarkets. This company was hence not further discussed as part of the performance results, but data were included in the graphs and tables. The company's portfolios were also analysed in relation to the proportion of ultra-processed foods (according to the NOVA classification) and products not permitted to be marketed to children according to the WHO Europe nutrient profile model (WHO-Model).

METHODS

For supermarkets, food promotions were collected from all circulars over 1 year. Foods promoted were classified according to the WHO-Model categories and the level and purpose of processing per the NOVA classification. Promotional characters (i.e. cartoons, licensed characters) & premium offers within promotions were also analysed. For quick service restaurants, the mean density of outlets within 500m road network distance from the entrance of primary as well as secondary schools was analysed using the Locatus database of food retailers (2020) for Flanders. For Paul, there were only two outlets identified in Flanders and as such Paul was excluded for this analysis.

Selection of food companies

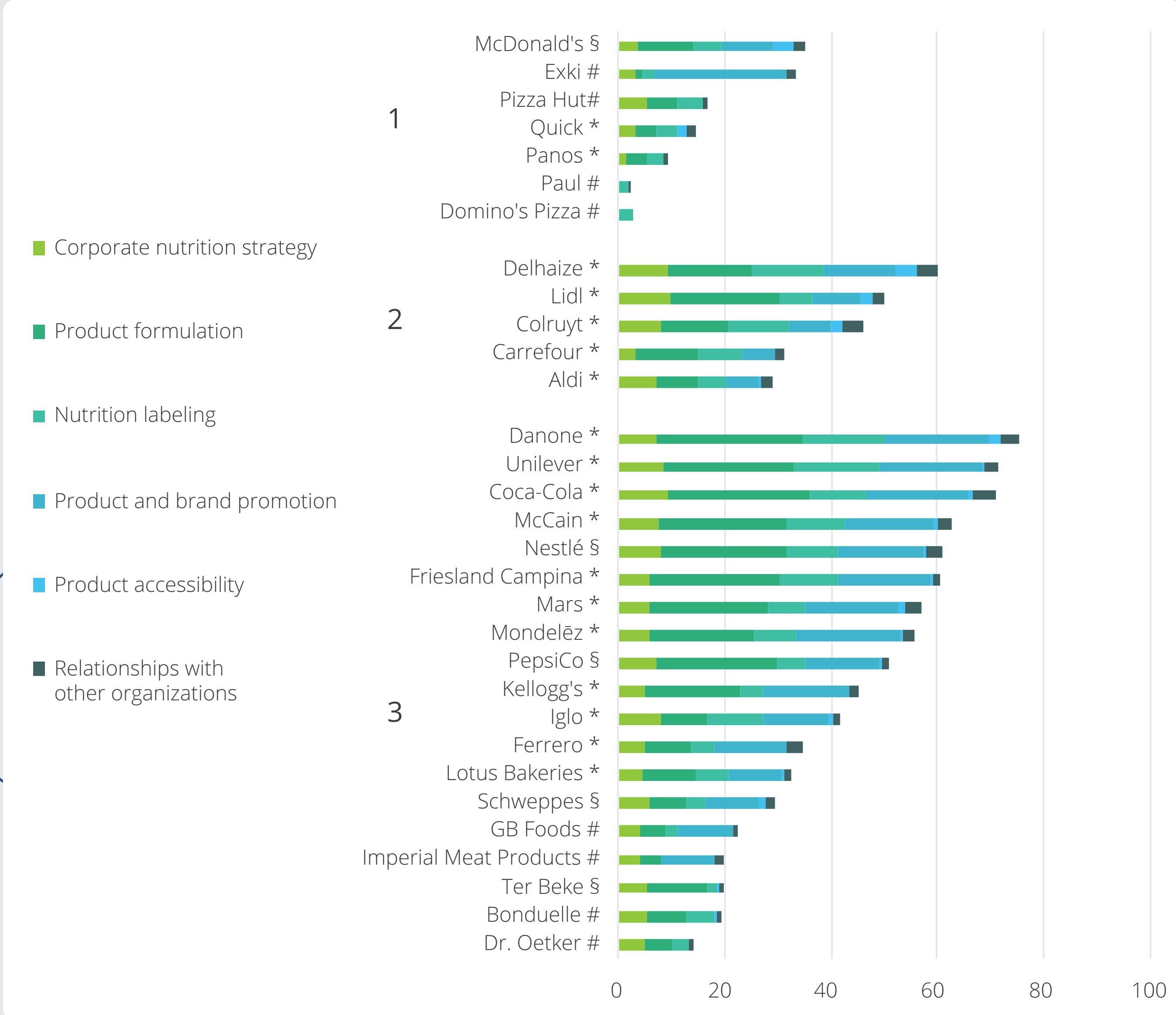
In total, 31 companies (17 packaged food manufacturers, 3 beverage manufacturers, 5 supermarkets and 7 quick service restaurants), with a combined market share of over 40% for packaged food manufacturers (44%) and supermarkets (49%) and over 50% for non-alcoholic beverage manufacturers (50%) and quick service restaurants (52%), were selected using the 2018 Euromonitor market share data for Belgium. PepsiCo was scored as both a packaged food and a non-alcoholic beverage manufacturer. Supermarkets were assessed as a retailer as well as a packaged food and non-alcoholic beverage manufacturer, so the BIA-Obesity scores are a hybrid assessment.

Sector	Market share	Companies included (in order of market share)
Packaged food manufacturers	20.4 % [1]	Mondelēz Unilever Nestlé Danone Friesland Campina Pepsico [2] Ter Beke Ferrero GB Foods (previously Continental Foods) Mars Lotus Bakeries Kellogg's Iglo Dr. Oetker Bonduelle Imperial Meat Products McCain
Non-alcoholic beverage manufacturers	41.6% [3]	Coca-Cola PepsiCo[2] Schweppes (Suntory Holdings)
Quick service restaurants	52.4%	McDonald's Quick Panos Pizza Hut Exki Domino's Pizza Paul
Supermarkets	49.4%	Colruyt Delhaize Aldi Carrefour Lidl

1 ,3. Excluding the supermarkets as packaged food manufacturers (market share foods: 23.3%; market share beverages: 8.8%).
2. Evaluated as both a packaged food as well as non-alcoholic beverage manufacturer.

Commitments

Ranking of food companies by sector based on specificity, comprehensiveness and transparency of their commitments related to obesity prevention and population nutrition in Belgium (2020).



Business Impact assessment on Obesity and Population Nutrition (BIA-Obesity) Belgium 2020 – Overall and domain-specific scores for 1. Quick service restaurants, 2. Supermarkets, 3. Packaged food and non-alcoholic beverage manufacturers

** Full engagement with the process (N=18); # Declined participation (N=8); § Accepted participation, but contributions not received in time (N=5); For # and §: Assessment of commitments was based on publically available information only.*

Belgian food companies demonstrated some commitment to addressing obesity and improving population nutrition issues, but much stronger action is needed across all six BIA-Obesity domains and all four industry sectors. The best performing domain was *'Corporate nutrition strategy'* while the worst performing domain was *'Product accessibility'*. The overall scores ranged from 2% to 75% with a median overall score of 35%. The median overall score was 15% for quick service restaurants, 46% for supermarkets and 45% for packaged food and non-alcoholic beverage manufacturers. Generally, overall scores and domain-specific scores were lower for quick service restaurants than for packaged food and beverage manufacturers and for supermarkets. In particular the median score for both the domains *'Product and brand promotion'* and for 'Product accessibility' were 0 among quick service restaurants.

RESULTS

For packaged food and beverage manufacturers, the top scoring companies were companies that fully engaged with the BIA-Obesity tool and process. About 18 (58%) of the selected Belgian companies, including all selected supermarkets, fully engaged with the research process and provided feedback and validation in time during several steps in the process. We were unable to get surveys back in time from 5 out of 31 companies and 8 out of 31 companies declined participation in the process. It is important to note that company scores significantly improved after engagement with the process and that the median overall score of companies that did engage was significantly higher than the median score of those companies that didn't. The median overall score for those companies significantly increased from 34% (based on publically available information) to 51%. For the other companies, the assessment was based on publically available information only.

Best available company commitments to improve food environments

Best available commitments may stimulate other companies to improve their commitments and practices. The table below gives a non-exhaustive list with Belgian best available practice examples across different BIA-Obesity domains.

Domain	Company	Country	Examples of best practice commitments
A. Corporate nutrition strategy	LIDL	Belgium	Lidl includes SMART (specific, measurable, achievable, relevant and time bound) objectives and targets within the overarching nutrition strategy, key performance indicators, and refers to global priorities e.g. World Health Organization recommendations and Sustainable Development Goals, as well as national priorities e.g. Convention for a Balanced Diet. Regular reports are available at national level, including reporting against objectives and targets and progress made on each of the 50 sustainability targets defined under the Sustainability Strategy 2020.
B. Product formulation	DANONE	Belgium	Danone commits to specific, time-bound targets to reduce salt, saturated fats, sugar and energy content through the publicly available Danone Nutritional Targets 2020.
C. Nutrition labelling	DELHAIZE	Belgium	Delhaize commits to label all their own-brand packaged food products with Nutri-Score and to label all products (own-brand and other products) in-store and online with Nutri-Score.
D. Product and brand promotion	EXKI nature's kitchen	Belgium	Exki specifically commits to not advertise at all.
E. Product accessibility	colruyt	Belgium	Colruyt has a commitment that checkouts are free from unhealthy items (including confectionery, chocolate and soft drinks).
	DELHAIZE	Belgium	Delhaize commits to price reductions on Nutri-Score A and B products in-store and through their loyalty programme.
	DANONE	Belgium	Danone discloses its policy position on sugar taxes on the website and supports some forms of taxation on unhealthy food products by government
	McDonald's	Belgium	McDonald's commits to not provide free refills for caloric soft drinks
F. Relationships with external organizations	Coca-Cola	Global, including Belgium	Coca-Cola International publishes a full list of the external groups it funds/supports, including details of the nature, date and amount of support/funding given to research institutions, health professionals, scientific experts, professional organisations and partnerships related to health and nutrition. All information is updated annually.

Recommendations to improve commitments

Belgian food companies across sectors were performing well in some areas and had some commitments related to:

- Incorporating nutrition and health into their overarching corporate strategy to some extent
- Committing to implement the Nutri-Score nutrition labelling system on-pack, online and on the shelf
- Committing to the Belgian Pledge and the Convention for a Balanced Diet

Stronger action is needed across all four sectors to improve their commitments:

Corporate population nutrition strategy

1. *Prioritise population nutrition as part of the company's overall corporate strategy, including SMART (Specific, Measurable, Achievable, Relevant and Time bound) objectives and targets, appropriate resourcing and regular reporting against objectives and targets*
2. *Link the Key Performance Indicators of senior managers to nutrition targets in the corporate strategy*

Product formulation

1. *Commit to SMART targets on sodium, sugar, saturated fat and energy reduction across the product portfolio based on context-specific benchmarks by food category*
2. *Use the Nutri-Score to guide future efforts on product development and reformulation*

Nutrition labelling

1. *Support a European wide implementation of the Nutri-Score front-of-pack labelling system*
2. *Commit to labelling products with nutrition and health claims only when products are healthy according to an independently developed nutrient profiling system*
3. *Disclose energy content of foods and meals on the menus in-store (for quick service restaurants)*

Product and brand promotion

1. *Develop a comprehensive marketing policy that applies to children up to the age of 18 years*
2. *Use the World Health Organisation Regional Office for Europe nutrient profile model to define food products not-permitted to be marketed to children (i.e. unhealthy products)*
3. *Eliminate the use of promotion techniques with strong appeal to children (e.g., cartoon characters, interactive games) on non-permitted (i.e. unhealthy) food products across media and settings*

Product accessibility

1. *Support evidence-informed government policies such as a tax on sugar-sweetened beverages*
2. *Make a commitment to increase the proportion of healthy food products in the overall company portfolio*

Relationships with other organizations

1. *Publish all relationships with other organizations and funding for external research on the Belgian website*
2. *Disclose all political donations in real time, or commit to not making any political donations*

There is considerable room for improvement of the transparency, specificity and comprehensiveness of commitments for most companies. The conversion of commitments into practice needs further evaluation and monitoring.

Commitments

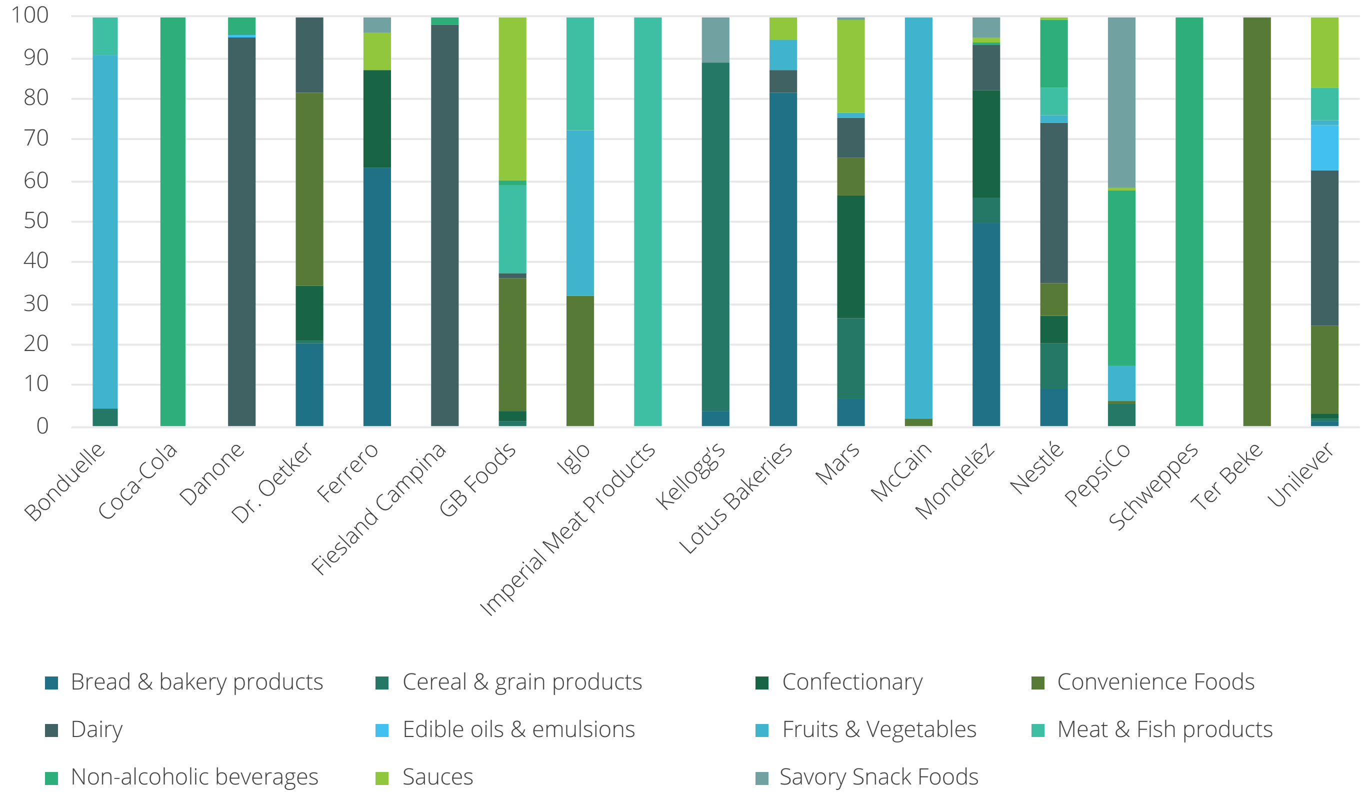
The median overall score for the commitments of packaged food and non-alcoholic beverage manufacturers (45%) was higher than the median overall score for all companies (35%) (including quick service restaurants and supermarkets). The best performing company was Danone with an overall score of 75% while the worst performing company was Dr. Oetker with an overall score of 14%. The best performing domain for packaged food and non-alcoholic beverage manufacturers was 'product formulation' and the worst performing domain was 'product accessibility'. None of the packaged food or non-alcoholic beverage manufacturers obtained a maximum score for any of the policy domains. One of the nineteen companies had no commitments on nutrition labelling, three had no commitments on product and brand promotion, and four had no commitments on product accessibility. Eleven out of 19 packaged food and non-alcoholic beverage manufactures fully engaged with the BIA-Obesity process.

Scores of packaged food and non-alcoholic beverage manufacturers by BIA-Obesity domain

	Weighting (%) in overall score	Median score (%)	Range of scores (%)
STRAT: Corporate population nutrition strategy	10	60	40 - 93
FORM: Product formulation	30	61	13 - 91
LABEL: Nutrition labelling	20	29	0 - 79
PROMO: Product and brand promotion	30	46	0 - 66
ACCESS: Product accessibility	5	10	0 - 46
RELAT: Relationships with other organizations	5	33	11 - 83
OVERALL BIA-Obesity score	100	45	14 - 75

Performance

Both Nestlé and Unilever had food products within nine out of the eleven food categories. Coca-Cola (Non-alcoholic beverages), Imperial Meat Products (Meat & Fish products) and Schweppes (Non-alcoholic beverages) in turn only had products within one single food category. As Ter Beke only had two food products within the Nutritrack branded food composition database (2018), this company is not further discussed as part of the performance results, but data are included in the graphs and tables.



An overview of the proportion of food and beverage products per food category for the selected packaged food and non-alcoholic beverage manufacturers (Nutri-track Belgium, 2018).

The energy-, sugar-, saturated fat- and salt content per food category differed across food companies within food categories, indicating that reformulation within food categories to improve the nutrient content is possible. The table below gives an overview of the best and worst performing company per product category and per nutrient of concern (year=2018).

Some companies, such as Coca-Cola, Friesland Campina and Schweppes, never appear as best or worst performing company for any product category or nutrient of concern. GB Foods in turn reoccurs most often as best performing company across product categories and nutrients (ten times) while Nestlé and Ferrero appear most often as worst performing companies (eight times and seven times, respectively).

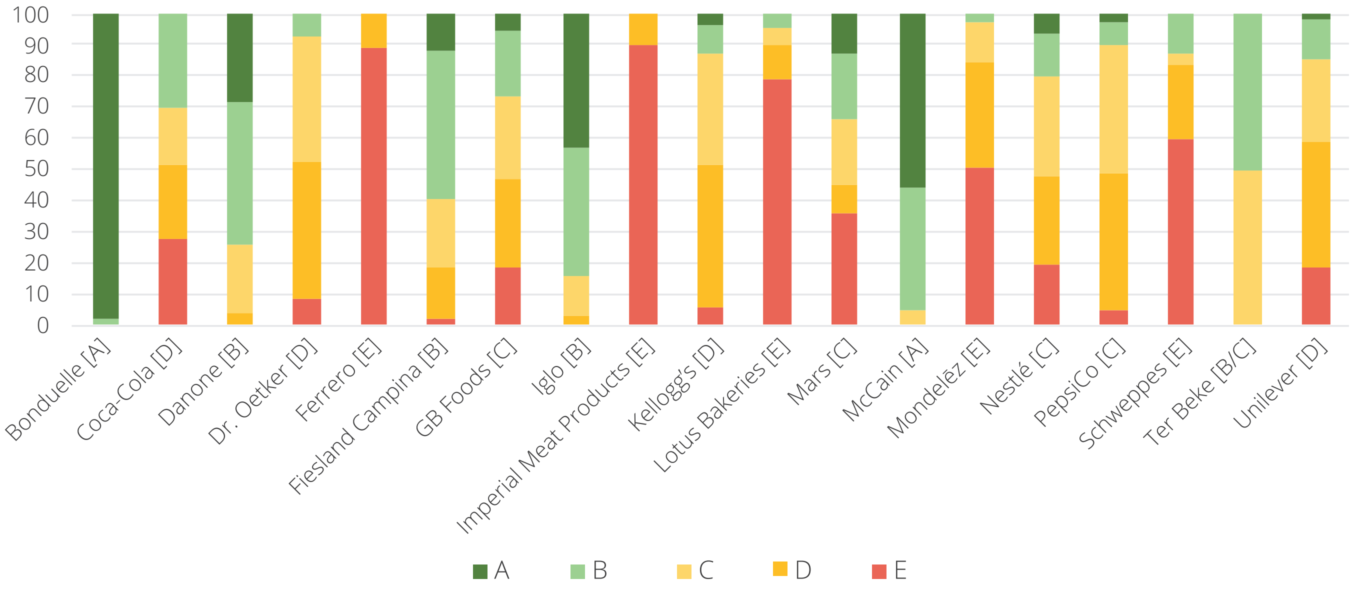
RESULTS

The best (top) and worst (bottom) performing packaged food and non-alcoholic beverage manufacturer(s) per product category and per nutrient of concern (Nutritrack Belgium, 2018).

Product portfolio content of nutrients of concern [1]					
Product Categories [2]	**Rank**	**Mean [SD] energy content (kj/100g)**	**Mean [SD] sugar content (g/100g)**	**Mean [SD] saturated fat content (g/100g)**	**Mean [SD] salt content (g/100g)**
Bread & bakery products	Healthiest	Dr. Oetker: 1326 [429]	Unilever: 19 [12]	Kellogg's: 5 [0]	Unilever: 0.3 [0.2]
	Least healthy	Ferrero: 2131 [199]	Mars: 47 [7]	Ferrero: 14 [6]	Nestlé: 1.1 [0.6]
Cereal & grain products [3]	Healthiest	Mars: 644 [67]	GB Foods: 0.2 [0.1]	GB Foods: 0.2 [0.1]	Bonduelle: 0.0 [0]
	Least healthy	Mondelēz: 1793 [107]	Mondelēz: 23 [4] Nestlé: 23 [5]	Nestlé: 4 [2]	GB Foods: 21 [27]
Confectionary	Healthiest	GB Foods: 1231 [267]	Unilever: 16 [14]	Unilever: 0.1 [0]	Unilever: 0 [0]
	Least healthy	Mondelēz: 2120 [408]	Dr. Oetker: 70 [20]	Mondelēz: 16 [7]	Mars: 0.3 [0.2]
Convenience Foods	Healthiest	GB Foods: 187 [104]	GB Foods: 1.5 [1]	GB Foods: 0.6 [0.5]	GB Foods: 0.8 [0.1] Iglo: 0.8 [0.5]
	Least healthy	Dr. Oetker: 955 [87]	Dr. Oetker: 3 [1]	Dr. Oetker: 4 [1]	Dr. Oetker: 1.2 [0.2] Nestlé: 1.2 [0.3] Ter Beke: 1.2 [0.3]
Dairy	Healthiest	Danone: 355 [162]	GB Foods: 4 [7]	GB Foods: 0.7 [0.5]	Several companies: 0.2
	Least healthy	Lotus Bakeries: 1491 [240]	Lotus Bakeries: 28 [5]	Mars: 12 [5]	Dr. Oetker: 1.4 [4.7]
Fruits & Vegetable products [4]	Healthiest	Mars: 153 [3]	McCain: 0.6 [0.3]	Mars: 0 [0]	Lotus Bakeries: 0.1 [0]
	Least healthy	PepsiCo: 2273 [230]	Lotus Bakeries: 42 [5]	PepsiCo: 5 [2]	Unilever: 48 [14]
Meat & Fish products	Healthiest	Bonduelle: 742 [137]	GB Foods: 0.5 [1.4]	Bonduelle: 1.1 [0.5]	Iglo: 0.8 [0.4]
	Least healthy	Imperial Meat Products: 1788 [411]	Bonduelle: 3 [1]	Imperial Meat Products: 13 [5]	Imperial Meat Products: 4 [0.6]
Non-alcoholic beverages	Healthiest	Danone: 28 [43]	Danone: 1.6 [2.4]	Several companies: 0	Several companies: 0
	Least healthy	Nestlé: 448 [714]	Nestlé: 18 [29]	Nestlé: 0.9 [3]	Nestlé: 0.1 [0.3]
Sauces	Healthiest	Mars: 533 [585]	Nestlé: 0.7 [0.6]	Mars: 1.2 [2.9]	Ferrero: 0.1 [0]
	Least healthy	Lotus Bakeries: 2414 [29]	Ferrero: 56 [0]	Ferrero: 11 [0]	Mars: 4 [6]
Savoury Snack Foods	Healthiest	Mondelēz: 1981 [111]	Kellogg's: 3 [1]	PepsiCo: 3 [0.7]	Ferrero: 1.5 [0.3]
	Least healthy	Ferrero: 2268 [124]	Ferrero: 24 [0.8]	Ferrero: 20 [6]	Mondelēz: 1.7 [0.4]

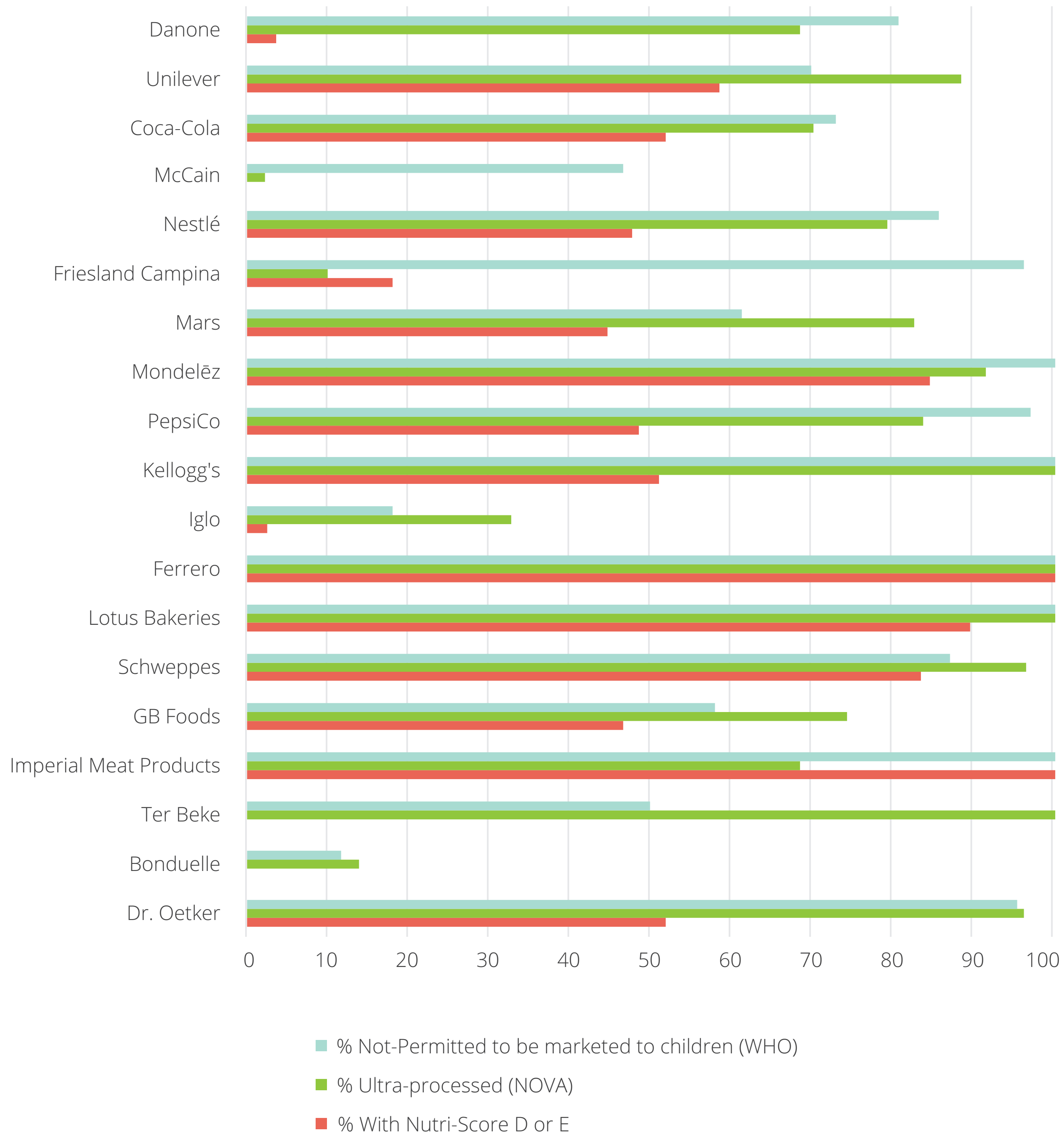
1. Only companies with more than one product within the specific product category were taken into account.
2. The product category 'Edible oils & emulsions' was not included as few companies have it as part of their portfolio.
3. Including 'baking soda', belonging to the category 'Cereal & grain products' within the FoodSwitch categorization.
4. Including 'seasonings', belonging to the category 'Fruits & Vegetable products within the FoodSwitch categorization.

The company with the highest proportion of Nutri-Score A products was Bonduelle (97.7%), while the company with the highest proportion of Nutri-Score E products was Imperial Meat Products (90.2%), closely followed by Ferrero (88.9%). The companies with the lowest proportion of Nutri-Score A products (0%) were Coca-Cola, Dr. Oetker, Ferrero, Imperial Meat Products, Lotus Bakeries, Mondelēz and Schweppes. The companies with the lowest proportion of Nutri-Score E products (0%) were Bonduelle, Danone, Iglo and McCain. Excluding Ter Beke, out of the 18 companies, two companies had median Nutri-Score A, while five companies had median Nutri-Score E.



The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score [] within the portfolios of the selected packaged food and beverage manufacturers (Nutritrack Belgium, 2018).

For three out of 18 companies, their entire portfolio (100%) was composed of ultra-processed food products. Five companies (Ferrero, Imperial Meat Products, Kellogg's, Lotus Bakeries and Mondelēz) only had products in their portfolio that were not-permitted to be marketed to children according to the WHO-Model.

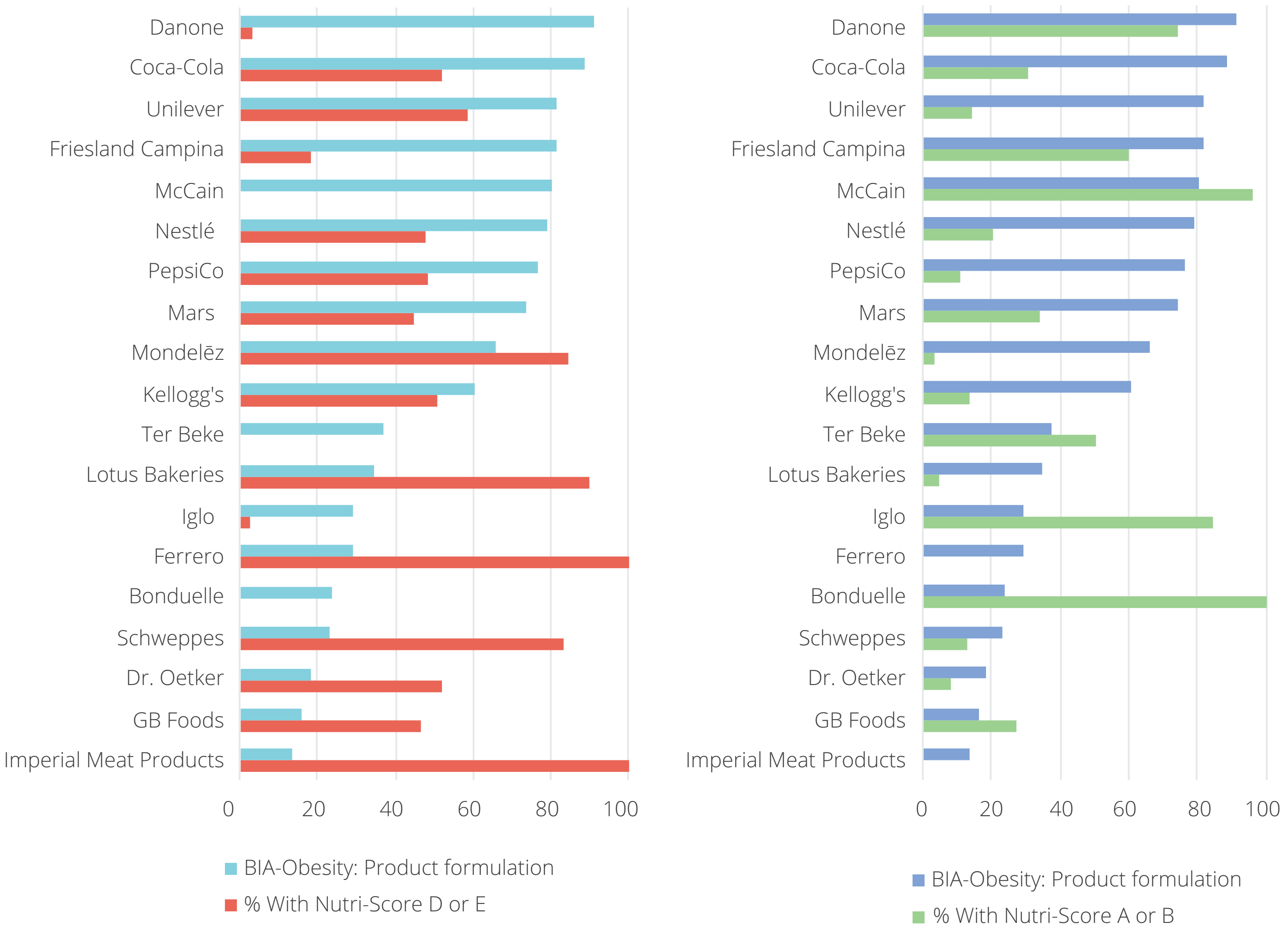


The percentage of products not-permitted to be marketed to children, ultra-processed and with Nutri-score D or E within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers.
Data are sorted according to descending total BIA-Obesity scores (Belgium, 2018).

In April 2019 the Nutri-Score was officially launched in Belgium. In November–December 2019, pictures for 1781 products displaying Nutri-Score on the front-of-pack were collected in-store from the five biggest retailers, representing about 10% of products on the market in Belgium. About 90% of products displaying Nutri-Score on the front of pack in 2019 were own-brand products from two major food retailers, while the few remainder were branded products. About 56% of products displayed Nutri-Score A or B while 26% of products displayed Nutri-Score D or E. For packaged food and non-alcoholic beverage companies, Iglo and Danone had 34% of products with Nutri-Score on the front-of-pack by end of 2019 and were the best performing companies for this particular labelling indicator.

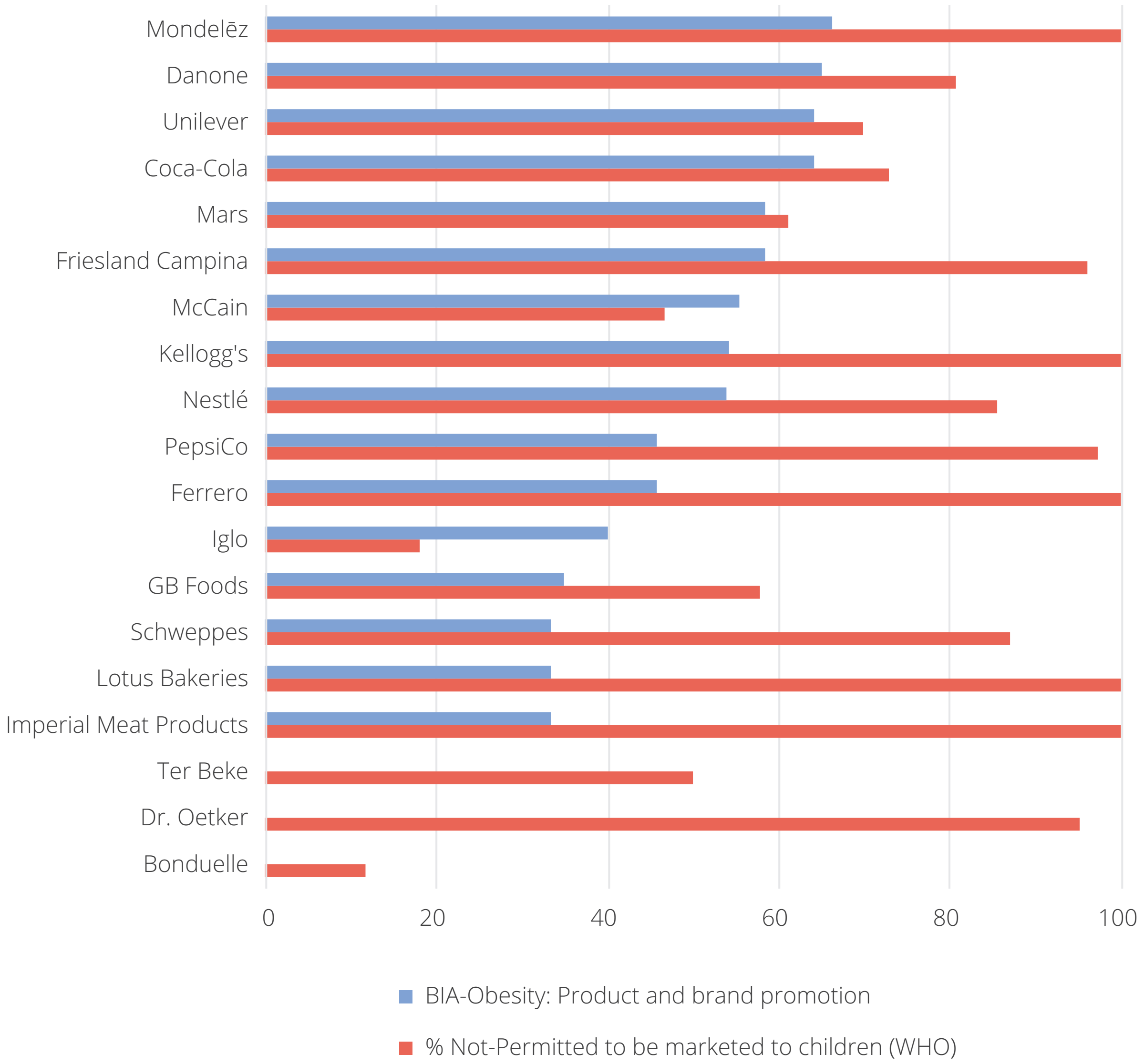
Commitments versus performance

The association between performance metrics and the BIA-Obesity scores for the commitments made within the corresponding BIA-Obesity domains was assessed. Company commitments made within the BIA-Obesity domain *'Product formulation'* were compared with the percentage of A and B Nutri-Score as well as D and E Nutri-Score products within the portfolio. Stronger commitments were not associated with a better Nutri-Score across the product portfolio.



The percentage of products with Nutri-Score D or E (left) and Nutri-Score A or B (right) within the portfolios of the selected packaged food and beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product formulation'.
Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).

Company commitments made within the BIA-Obesity domain 'Product and brand promotion' were in turn compared with the percentage of products within the company portfolio that were not-permitted to be marketed to children according to the WHO-Model. Stronger commitments were not related with a higher proportion of products within the product portfolio permitted to be marketed to children according to the WHO-Model. The portfolio of Mondelēz, having the strongest commitments to limit marketing towards children, consisted of 100% of food products not permitted to be marketed to children. Among the companies that made no commitments to limit marketing to children (Bonduelle and Dr. Oetker, excluding Ter Beke) the percentage of products not permitted to be marketed to children varied from 12% to 95%.



The percentage of products not-permitted to be marketed to children within the portfolios of the selected packaged food and beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product and brand promotion'. *Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).*

An overview of the ranking of companies according to the overall BIA-Obesity score for the commitments and the various performance metrics can be found in the table below. Similar to the graphs above, a better ranking on the overall BIA-Obesity score does not necessarily translate into a better ranking according to the performance metrics.

The ranking of companies (1=best; 19=worst) according to the BIA-Obesity score, the proportion of products with Nutri-Score A and Nutri-Score E, the percentage of products permitted to be marketed to children and the percentage of non-ultra-processed food products.
Data are sorted according to the descending overall BIA-Obesity scores (Belgium, 2018).

Company	Rank of the company				
	BIA-Obesity Score	% of products with Nutri-Score A	% of products with Nutri-Score E	% of products permitted to be marketed to children (WHO)	% of products that are not ultra-processed (NOVA)
Danone	1	4	1/5	9	6
Unilever	2	11	11	7	12
Coca-Cola	3	12/19	13	8	7
McCain	4	2	1/5	3	1
Nestlé	5	7	12	10	9
Friesland Campina	6	6	6	13	2
Mars	7	5	14	6	10
Mondelēz	8	12/19	15	15/19	13
PepsiCo	9	10	7	14	11
Kellogg's	10	9	8	15/19	16/19
Iglo	11	3	1/5	2	4
Ferrero	12	12/19	18	15/19	16/19
Lotus Bakeries	13	12/19	17	15/19	16/19
Schweppes	14	12/19	16	11	15
GB Foods	15	8	10	5	8
Imperial Meat Products	16	12/19	19	15/19	5
Ter Beke	17	12/19	1/5	4	16/19
Bonduelle	18	1	1/5	1	3
Dr. Oetker	19	12/19	9	12	14

RESULTS

Areas of strength across the sector

Belgian packaged food and non-alcoholic beverage companies were performing well in some areas and had some commitments related to:

- Incorporating nutrition and health into the overarching corporate strategy to some extent
- Committing to implement the Nutri-Score nutrition labelling system on-pack, online and on the shelf
- Committing to the Belgian Pledge and the Convention for a Balanced Diet

Key recommendations for packaged food and non-alcoholic beverage manufacturers

Corporate population nutrition strategy

1. *Prioritise population nutrition as part of the overall corporate strategy, including SMART (Specific, Measurable, Achievable, Relevant and Time bound) objectives and targets, appropriate resourcing and regular reporting against objectives and targets*
2. *Link the Key Performance Indicators of senior managers to nutrition targets in the corporate strategy*

Product formulation

1. *Commit to SMART targets on sodium, sugar, saturated fat and energy reduction across the product portfolio based on context-specific benchmarks by food category*
2. *Use the Nutri-Score to guide future efforts on product development and reformulation*

Product labelling

1. *Support a European wide implementation of the Nutri-Score front-of-pack labelling system*
2. *Commit to labelling products with nutrition and health claims only when products are healthy according to an independently developed nutrient profiling system*

Product and brand promotion

1. *Develop a comprehensive marketing policy that applies to children up to the age of 18 years*
2. *Use the World Health Organisation Regional Office for Europe nutrient profile model to define food products not-permitted to be marketed to children (i.e. unhealthy products)*
3. *Eliminate the use of promotion techniques with strong appeal to children (e.g., cartoon characters, interactive games) on non-permitted (i.e. unhealthy) food products across media and settings*

Product accessibility

1. *Support evidence-informed government policies such as a tax on sugar-sweetened beverages*
2. *Make a commitment to increase the proportion of healthy food products in the overall company portfolio*

Relationships with other organizations

1. *Publish all national relationships and funding for external research on the Belgian website*
2. *Disclose all political donations in real time, or commit to not making political donations*

Findings by sector **Quick service restaurants**

Commitments

The median overall BIA-Obesity score for quick service restaurants (15%) was less than half of the median overall score for all companies (35%) (including packaged food and beverage manufacturers and supermarkets). The best performing company was McDonald's with an overall score of 35% while the worst performing company was Paul with an overall score of 2%. The best performing domain for fast food companies was 'product formulation' and the worst performing domains were 'product and brand promotion' and 'product accessibility'. Exki obtained the maximum score for the domain 'product and brand promotion' as they committed not to advertise at all. Two of the seven companies had no commitments on 'Corporate population nutrition strategy', one had no commitments to disclose relationships with other organizations, two had no commitments on 'product formulation', five had no commitments on 'product and brand promotion' and five had no commitments on 'product accessibility'. All companies had some commitments on nutrition labelling, mainly related to providing nutrition information about their foods and meals online. Only two companies engaged with the BIA-Obesity process.

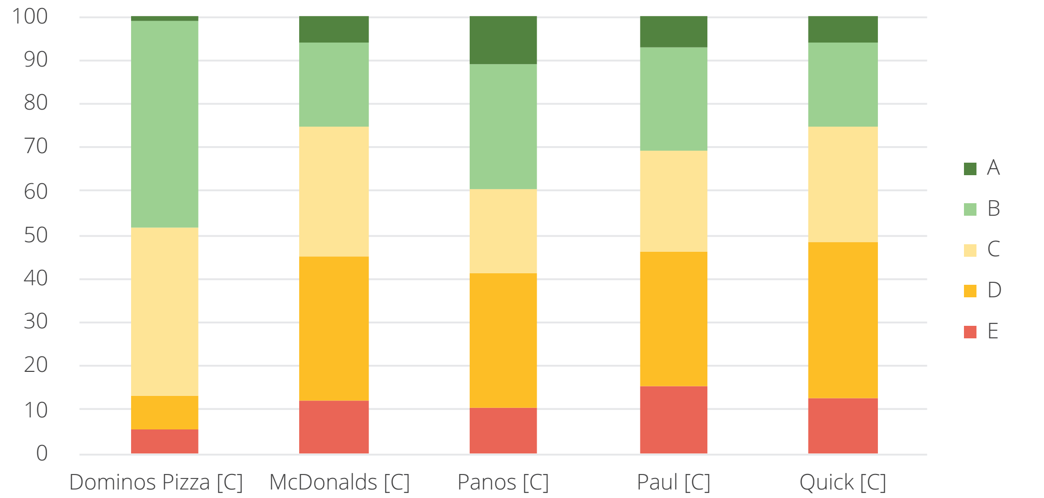
Scores of quick service restaurants by BIA-Obesity domain

	Weighting (%) in overall score	Median score (%)	Range of scores (%)
STRAT: Corporate population nutrition strategy	10	33	0-57
FORM: Product formulation	25	15	0-43
LABEL: Nutrition labelling	15	18	14-36
PROMO: Product and brand promotion	25	0	0-100
ACCESS: Product accessibility	20	0	0-18
RELAT: Relationships with other organizations	5	19	0-44
OVERALL BIA-Obesity score	100	15	2-35

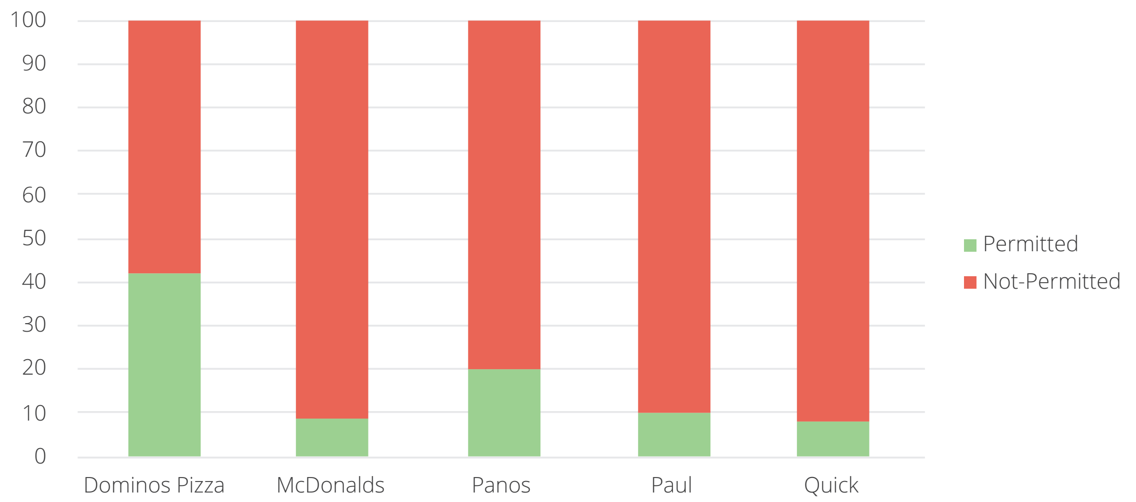
Performance

The quick service restaurant with the highest proportion of Nutri-Score A and B products was Domino's Pizza (48%), while the quick service restaurant with the highest proportion of Nutri-Score D and E products was Quick (48%), closely followed by Paul (46%). All five quick service restaurants for which the product portfolios could be analysed had a median Nutri-Score C.

For all five quick service restaurants, less than 50% of their product portfolio was permitted to be marketed to children according to the WHO-model. The product portfolio of Quick only contained 8% products that were permitted to be marketed to children. This went up to 42% for Domino's Pizza.



The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score [] within portfolios of selected quick service restaurants (Belgium, 2020).



The proportion of products permitted and not-permitted to be marketed to children according to the WHO-model within portfolios of selected quick service restaurants (Belgium, 2020).

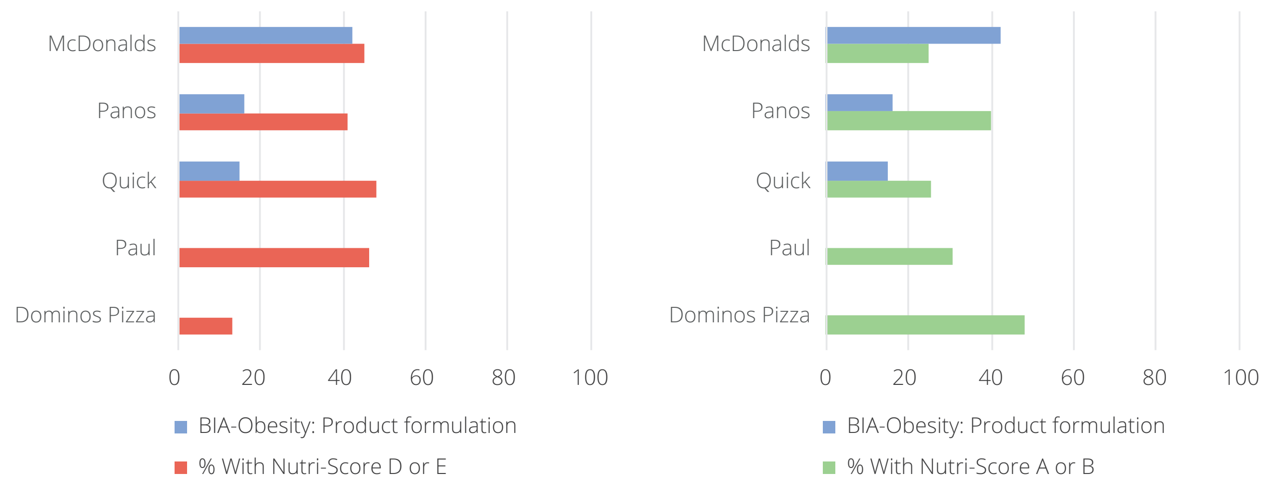
For four out of six quick service restaurants, more than 50% of their outlets in Flanders were located within 500m road network distance of primary schools. This percentage had increased since 2008 for Domino's Pizza, Quick and Pizza Hut (considering also the later introduction of Pizza Hut Delivery).

The % of total QSR outlets within 500m road network distance from primary and secondary schools (Belgium, 2020).

	Primary schools (N=3410)			Secondary schools (N=1198)		
	2008 (%)	2020 (%)	% change	2008 (%)	2020 (%)	% change
Domino's Pizza	50	79	57	50	68	36
Exki	100	50	-50	100	50	-50
McDonald's	36	31	-15	28	27	-4
Panos	74	69	-7	79	75	-4
Paul	/	/	/	/	/	/
Pizza Hut	58	36	-38	50	26	-49
Pizza Hut Delivery	/	73	/	/	62	/
Quick	35	37	3	19	20	3

Commitments versus performance

The performance metrics were compared with the commitments made within the corresponding BIA-Obesity domains. Company commitments made within the BIA-Obesity domain *'Product formulation'* were compared with the percentage of A and B Nutri-Score as well as D and E Nutri-Score products across portfolio. Stronger commitments were not related with a better Nutri-Score across the product portfolio.



The percentage of products with Nutri-Score D or E (left) and Nutri-Score A or B (right) within portfolios of selected quick service restaurants compared with the BIA-Obesity scores obtained within the domain 'Product formulation'. *Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).*

Company commitments made within the BIA-Obesity domain 'Product and brand promotion' could not be compared with the proportion of the product portfolio not permitted to be marketed to children as, among the QSR for which data were available, only McDonald's made commitments to limit marketing towards children.

A ranking of the quick service restaurants according to the BIA-Obesity score and the various performance metrics can be found in the table below. Similar to the graphs above, a higher BIA-Obesity score for the commitments does not necessarily translate into a better ranking according to the different performance metrics.

The ranking (1=best; 7=worst) of quick service restaurants according to the BIA-Obesity score, the proportion of products with Nutri-Score A and Nutri-Score E, the percentage of products permitted to be marketed to children and the percentage of outlets within 500 metres road network distance from primary- and secondary schools.
Data Data are sorted according to the descending overall BIA-Obesity scores (Belgium, 2018).

Company	Rank of the company					
	BIA-Obesity Score	% Nutri-Score A products	% Nutri-Score E products	% products permitted to be marketed to children (WHO)	% outlets within 500m of primary schools	% outlets within 500m of secondary schools
McDonald's	1	3	3	4	1	3
Exki	2	/	/	/	4	4
Pizza Hut	3	/	/	/	2	2
Pizza Hut Delivery	/	/	/	/	6	5
Quick	4	4	4	5	3	1
Panos	5	1	2	2	5	7
Domino's Pizza	6	5	1	1	7	6
Paul	7	2	5	3	/	/

RESULTS

Areas of strength across the sector

Belgian quick service restaurants were performing well in some areas and had some commitments related to:

- Disclosure of philanthropic funding and support for active lifestyle programs on the websites for most companies
- Comprehensive nutrition information of products provided on the national websites for most companies, although sometimes per serve instead of per 100g
- Commitment to improve the healthiness of oils used in frying foods for one company
- Commitment to not provide free refills for sugar sweetened beverages for one company

Key recommendations for quick service restaurants

Corporate population nutrition strategy

1. *Prioritise population nutrition as part of the overall corporate strategy, including SMART (Specific, Measurable, Achievable, Relevant and Time bound) objectives and targets, appropriate resourcing and regular reporting against objectives and targets*
2. *Link the Key Performance Indicators of senior managers to nutrition targets in the corporate strategy*

Product formulation

1. *Commit to SMART targets on sodium, sugar, saturated fat and energy reduction across the meals portfolio*

Product labelling

1. *Support a menu labelling policy introduced and implemented by the Government*
2. *Commit to provide comprehensive in-store information on energy and nutrient content on the menu boards*

Product and brand promotion

1. *Develop a comprehensive marketing policy that applies to children up to the age of 18 years*
2. *Use the WHO Europe nutrient profile model to define food products permitted to be marketed to children (i.e. unhealthy food products)*
3. *Eliminate the use of promotion techniques (e.g., cartoon characters, interactive games) with strong appeal to children on non-permitted (i.e. unhealthy) food products across different media and settings*
4. *Commit to only advertise or display 'healthy' sides and 'healthy' drinks in children's combination meals in restaurants*

Product accessibility

1. *Support evidence-informed government policies such as a tax on sugar-sweetened beverages*
2. *Commit to not provide free refills for sugary drinks*

Relationships with other organizations

1. *Publish all national relationships and funding for external research on the Belgian website*
2. *Disclose all political donations in real time, or commit to not making political donations*

Findings by sector **Supermarkets**

Commitments

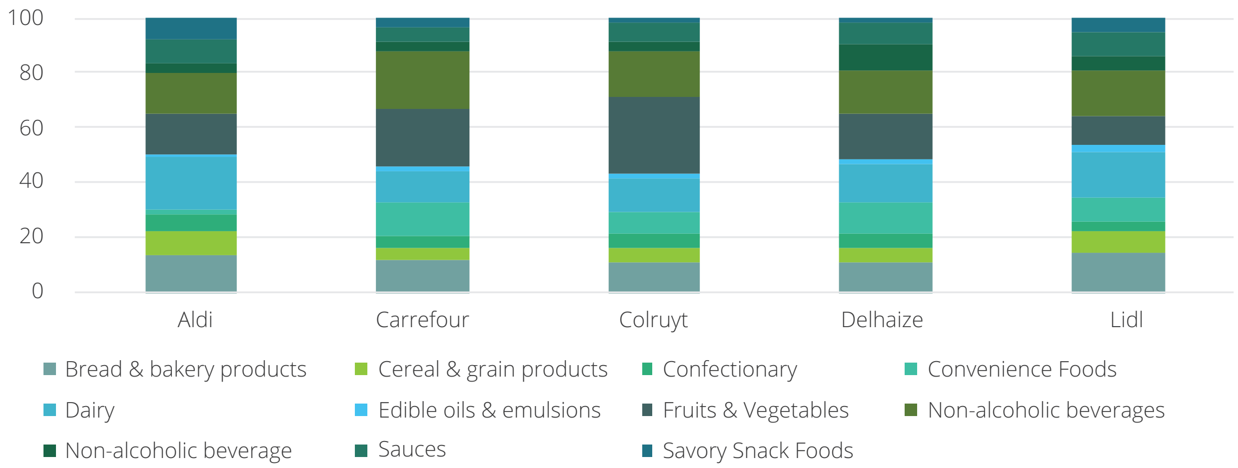
The scores for supermarkets are a hybrid assessment for their role as a retailer, as well as a packaged food and non-alcoholic manufacturer. The median overall score for the commitments of supermarkets (46%) was higher than the median overall score for all companies (35%) (including quick service restaurants, food and non-alcoholic beverage manufacturers). The best performing domain for supermarkets was 'corporate nutrition strategy'. The worst performing domain was 'product accessibility'. One company, Lidl, obtained the maximum score for the domain of 'corporate nutrition strategy'. One company, Carrefour did not have any commitments for the domain 'product accessibility'. All five supermarkets engaged in the BIA-Obesity process.

Scores of supermarkets by BIA-Obesity domain

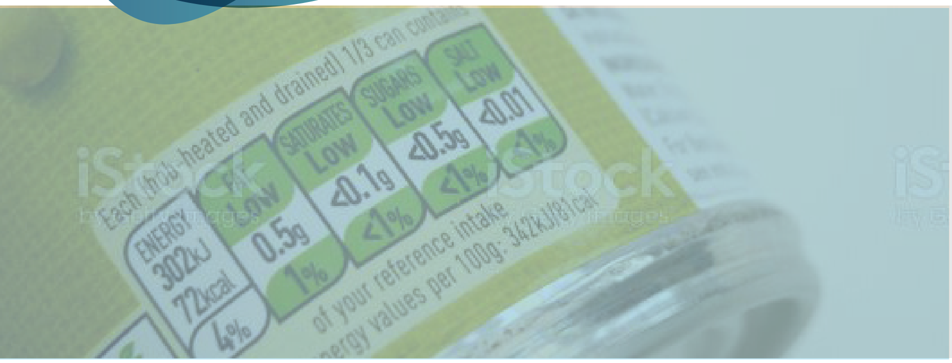
	Weighting (%) in overall score	Median score (%)	Range of scores (%)
STRAT: Corporate population nutrition strategy	10	82	33 - 100
FORM: Product formulation	15	50	32 - 82
LABEL: Nutrition labelling	25	55	33 - 90
PROMO: Product and brand promotion	20	32	24 - 55
ACCESS: Product accessibility	5	11	0 - 20
RELAT: Relationships with other organizations	25	44	33 - 78
OVERALL BIA-Obesity score	100	46	29 - 60

Performance

All supermarkets had own-brand products within the eleven selected food categories.



An overview of the proportion of products per food category for the selected supermarkets (Nutri-track Belgium, 2018).



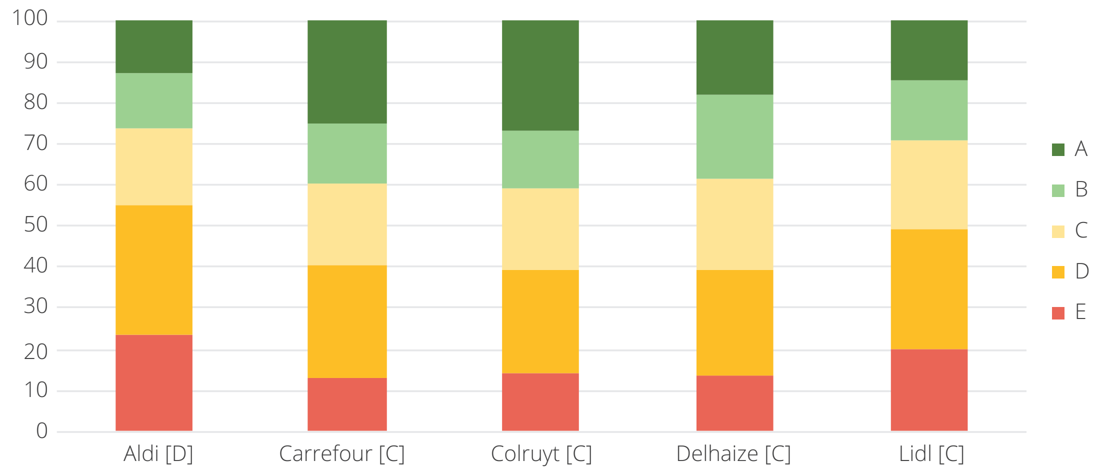
The average energy-, sugar-, saturated fat- and salt content per food category was rather similar across the selected supermarkets within food categories. Nevertheless, the table below gives an overview of the best and worst performing supermarket per product category and per nutrient of concern.

The best (top) and worst (bottom) performing supermarkets per product category and per nutrient of concern (Nutri-track Belgium, 2018).

Product portfolio content of nutrients of concern					
Product Categories	Rank	Mean [SD] energy content (kj/100g)	Mean [SD] sugar content (g/100g)	Mean [SD] saturated fat content (g/100g)	Mean [SD] salt content (g/100g)
Bread & bakery products	Healthiest	Carrefour: 1585 [441]	Delhaize: 20 [17]	Colruyt: 7 [6]	Several companies: 0.7
	Least healthy	Lidl: 1831 [355]	Aldi: 27 [15]	Lidl: 10 [7]	Delhaize: 0.9 [0.6]
Cereal & grain products [1]	Healthiest	Carrefour: 1434 [296]	Carrefour: 7 [10]	Aldi: 1 [1.5]	Colruyt: 0.3 [0.6]
	Least healthy	Lidl: 1580 [341]	Lidl: 13 [12]	Lidl: 2 [3]	Lidl: 0.9 [5]
Confectionary	Healthiest	Delhaize: 1630 [590]	Carrefour: 49 [24]	Delhaize: 7 [9]	Several companies: 0.1
	Least healthy	Lidl: 1987 [489]	Aldi: 57 [32]	Lidl: 14 [9]	Lidl: 0.2 [0.2]
Convenience Foods	Healthiest	Aldi: 480 [297]	Aldi: 2.2 [1.1] Lidl: 2.2 [1.5]	Colruyt: 2.1 [1.5]	Aldi: 0.9 [0.3]
	Least healthy	Carrefour: 701 [438]	Delhaize: 3 [5]	Carrefour: 2.8 [2.8] Lidl: 2.8 [2.3]	Colruyt: 1.4 [6]
Dairy	Healthiest	Aldi: 649 [391]	Carrefour: 8 [9]	Aldi: 6 [6]	Several companies: 0.6
	Least healthy	Carrefour: 926 [522]	Aldi: 12 [8]	Carrefour: 10 [8]	Carrefour: 0.7 [1.2]
Fruits & Vegetable products [2]	Healthiest	Colruyt: 632 [754]	Colruyt: 9 [15]	Colruyt: 1.3 [3.7]	Lidl: 0.3 [0.5]
	Least healthy	Lidl: 1228 [1001]	Aldi: 20 [24]	Lidl: 3 [3]	Carrefour: 0.7 [5]
Meat & Fish products	Healthiest	Lidl: 805 [354]	Colruyt: 0.9 [1.3] Lidl: 0.9 [1.5]	Lidl: 4 [4]	Lidl: 1.6 [1.5]
	Least healthy	Delhaize: 898 [404]	Aldi: 1.5 [2]	Several companies: 4.3	Delhaize: 2.2 [1.7]
Non-alcoholic beverages	Healthiest	Aldi: 111 [99]	Aldi: 6.1 [5]	Several companies: 0.1	Several companies: 0
	Least healthy	Carrefour: 331 [436]	Carrefour: 17 [23]	Delhaize: 0.4 [1.8]	Delhaize: 0.1 [0.1]
Sauces	Healthiest	Delhaize: 911 [918]	Delhaize: 9 [13]	Delhaize: 2 [3]	Aldi: 1.2 [1]
	Least healthy	Aldi: 1608 [991]	Aldi: 18 [20]	Aldi: 4 [3]	Delhaize: 3 [8]
Savoury Snack Foods	Healthiest	Aldi: 1657 [589]	Colruyt: 5 [6]	Lidl: 4 [3]	Delhaize: 1.4 [0.4] Lidl: 1.4 [0.5]
	Least healthy	Colruyt: 1884 [495]	Carrefour: 6 [10]	Carrefour: 6 [7]	Colruyt: 1.8 [0.8]

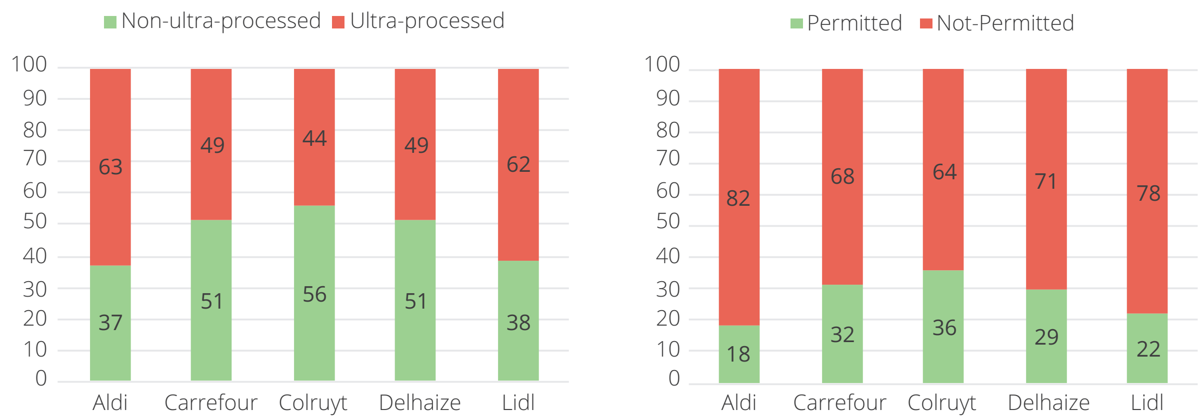
1. Including 'baking soda', belonging to the category 'Cereal & grain products' within the FoodSwitch categorization.
2. Including 'seasonings', belonging to the category 'Fruits & Vegetable products within the FoodSwitch categorization.

The supermarket with the highest proportion of Nutri-Score A products was Colruyt (26.8%), while the company with the highest proportion of Nutri-Score E products was Aldi (23.3%) followed by Lidl (20.2%). Carrefour, Colruyt, Delhaize and Lidl had a median Nutri-Score of C while Aldi had a median Nutri-score of D.



The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score [] within the portfolios of the selected supermarkets (Nutri-track Belgium, 2018).

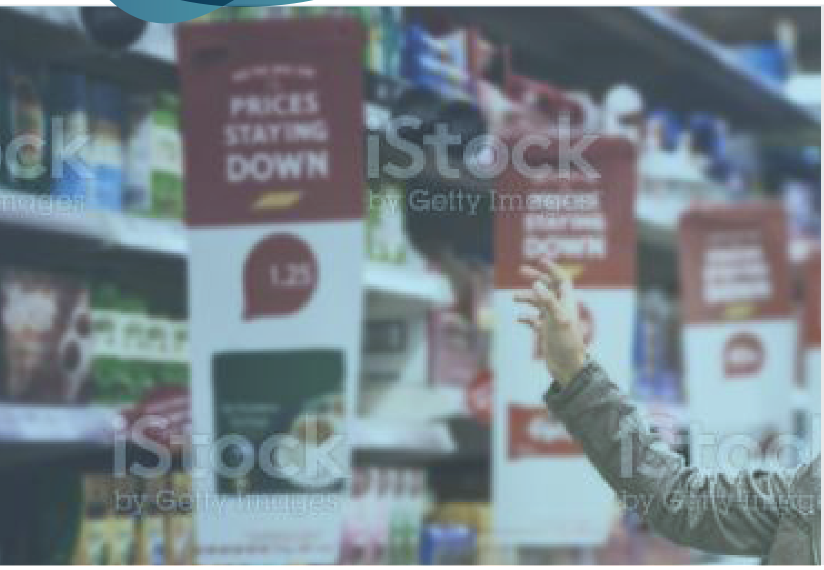
The supermarket portfolios were also analysed in relation to the proportion of ultra-processed foods and products permitted to be marketed to children. The portfolio of Colruyt had the highest proportion of non-ultra-processed products (56.2%) and products permitted to be marketed to children (35.7%). Aldi had the highest proportion of ultra-processed products (62.9%) and products not permitted to be marketed to children (82.2%), followed by Lidl.



The proportion of (non-) ultra-processed products (left) and the proportion of products (not-) permitted to be marketed to children (right) within portfolios of selected supermarkets (Nutri-track Belgium, 2018).

Nutri-Score was officially introduced in Belgium in April 2019. In November–December 2019, pictures for 1781 products displaying Nutri-Score on the front of pack were collected from the five biggest retailers, representing about 10% of products on the market in Belgium. About 90% of products displaying Nutri-Score on the front of pack in 2019 were own-brand products from two major food retailers, while the few remainders were branded products. About 56% of products displayed Nutri-Score A or B while 26% of products displayed Nutri-Score D or E. For supermarkets, Delhaize had about 30% of products with Nutri-Score on the front-of-pack by end of 2019 and was the best performing company for this indicator.

RESULTS



For the food promotions in the supermarket flyers, it was found that promotions were mostly for ultra-processed foods. Nevertheless, among all supermarkets, the promotions on the cover of the flyers tended to be healthier with a higher percentage of fresh fruits and vegetables and a lower percentage of ultra-processed foods. Considerable variation was observed between the different supermarkets. Across the entire circular, as well as on the front cover, Aldi most frequently promoted fresh fruits and vegetables while this was least common in the flyers of Colruyt.

Healthiness and power of food promotions in supermarket flyers (Belgium 2019 – 2020) [1].

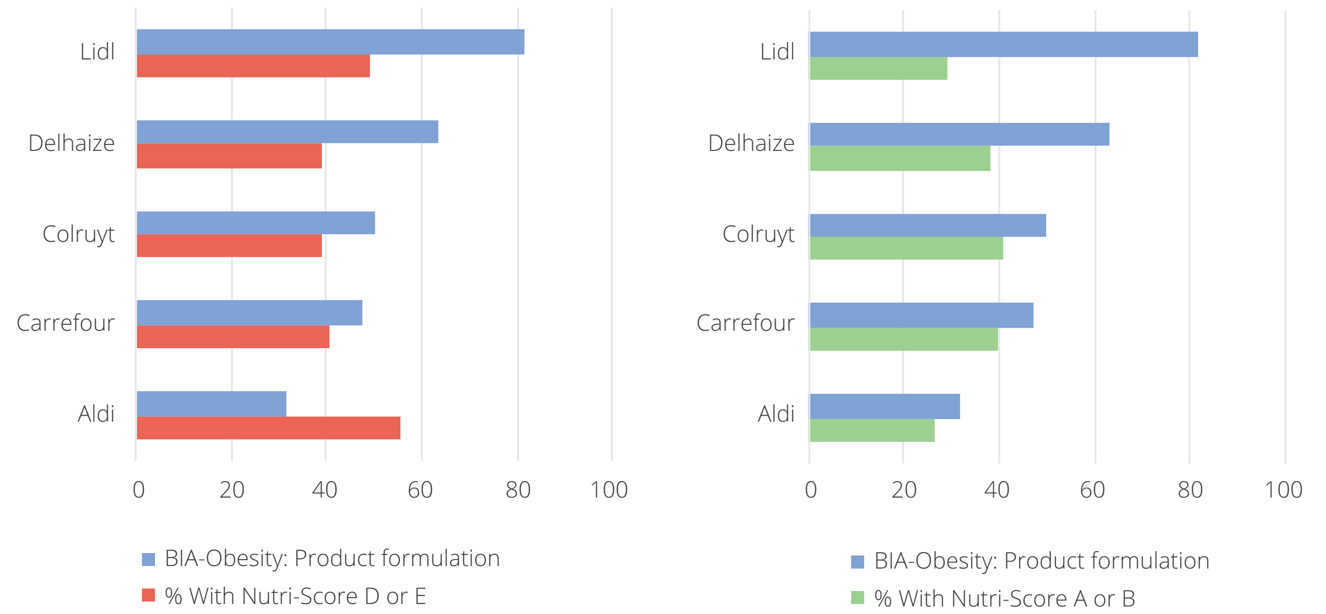
	Delhaize	Colruyt	CarrefourHM	CarrefourM	Lidl	Aldi
Entire circular						
% Promotional characters	7.8	0.7	6.4	9.3	6.6	4.0
% Premium offers	41.9	1.6	38.6	31.1	10.1	2.4
% fresh fruit and vegetable promotions	6.8	3.9	7.9	9.9	9.5	17.5
% promotions for ultra-processed foods	52.1	61.6	48.4	45.7	42.9	59.6
Front cover circular						
% promotions on front	5.6	1.9	1.5	10.5	5.5	2.7
% fresh fruit and vegetable promotions	24.3	12.5	21.3	20.5	24.5	40.8
% promotions for ultra-processed foods	10.3	72.2	36.2	19.0	19.4	36.7

1. These results were previously published: Vandevijvere, S., & Van Dam, I. (2021). The nature of food promotions over one year in circulars from leading Belgian supermarket chains. Archives of Public Health, 79(1), 1-8.

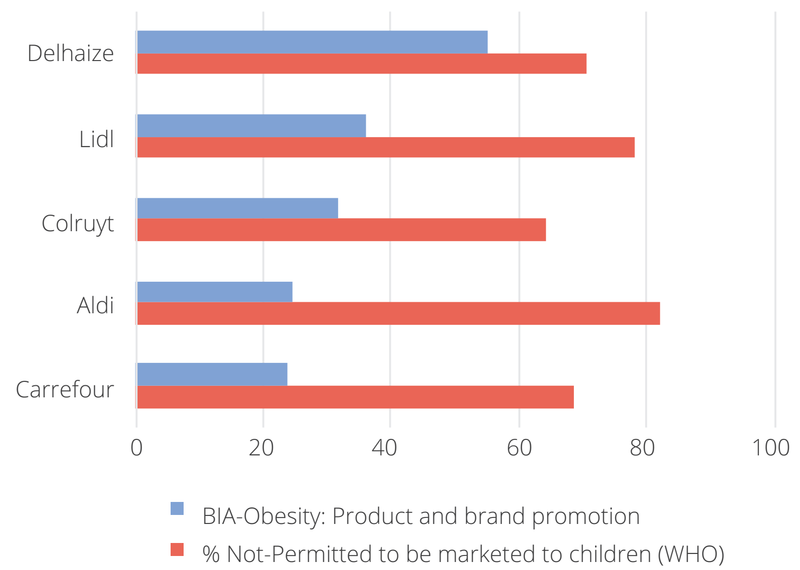
Commitments versus performance

The performance metrics were compared with the commitments made within the corresponding BIA-Obesity domains. Company commitments made within the BIA-Obesity domain 'Product formulation' were compared with the percentage of A and B Nutri-Score as well as D and E Nutri-Score products within company portfolio. Stronger commitments were not related with a better Nutri-Score across the product portfolio.

Supermarkets' commitments made within the BIA-Obesity domain 'Product and brand promotion' were in turn compared with the percentage of products within the company portfolio that were not-permitted to be marketed to children according to the WHO-Model. Stronger commitments were not related with more products within the product portfolio being permitted to be marketed to children.



The percentage of products with Nutri-Score D or E (left) and Nutri-Score A or B (right) within portfolios of selected packaged food and beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product formulation'.
Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).



The percentage of products not-permitted to be marketed to children within portfolios of selected supermarkets compared with the BIA-Obesity scores obtained within the domain 'Product and brand promotion'.
Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).

RESULTS

A ranking of selected supermarkets according to the BIA-Obesity score and the various performance metrics can be found in the table below. Similar to the graphs above, a higher BIA-Obesity score does not necessarily translate into a better ranking according to the performance metrics.

The ranking (ranking 1= best, 5=worst) of supermarkets according to the BIA-Obesity score, the proportion of products with Nutri-Score A and Nutri-Score E, the percentage of products permitted to be marketed to children, the percentage of non-ultra-processed food products and the amount of fresh fruits and vegetables promoted within supermarket flyers.
Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2018).

Company	Rank of the company						
	BIA-Obesity Score	% Nutri-Score A products	% Nutri-Score E products	% of products permitted to be marketed to children (WHO)	% Non-ultra-processed food products (NOVA)	Promotions fresh fruits and vegetables	Promotions ultra-processed food products (NOVA)
Delhaize	1	3	2	3	3	4	3
Lidl	2	4	4	4	4	2	1
Colruyt	3	1	3	1	1	5	5
Carrefour	4	2	1	2	2	3	2
Aldi	5	5	5	5	5	1	4

Areas of strength across the sector

Belgian supermarkets were performing well in some areas and made some commitments in the following areas:

- Strong commitment to improving population nutrition on the national website, for one company there is annual reporting against specific objectives and targets and key performance indicators of senior managers are linked to nutrition targets
- Clear commitment to reformulate private label grocery products with respect to saturated fat, sugar, sodium
- Commitment to display the Nutri-Score on all private label grocery products, including online, as well as on the shelf for some retailers

Key recommendations for supermarkets

Corporate population nutrition strategy

1. *Prioritise population nutrition as part of the overall corporate strategy, including SMART (Specific, Measurable, Achievable, Relevant and Time bound) objectives and targets, appropriate resourcing and regular reporting against objectives and targets*
2. *Link the Key Performance Indicators of senior managers to nutrition targets in the corporate strategy*

Product formulation

1. *Commit to SMART targets on sodium, sugar, saturated fat and energy reduction across the product portfolio based on context-specific benchmarks by food category*
2. *Use the Nutri-Score to guide future efforts on product development and reformulation*

Product labelling

1. *Support a European wide implementation of the Nutri-Score*
2. *Commit to labelling products with nutrition and health claims only when products are healthy according to an independently developed nutrient profiling system*
3. *Commit to labelling all products online and on the shelf with Nutri-Score*

Product and brand promotion

1. *Develop a comprehensive marketing policy that applies to children up to the age of 18 years*
2. *Use the WHO Europe nutrient profile model to define food products permitted to be marketed to children (i.e. unhealthy products)*
3. *Commit to limit the in-store promotion of unhealthy products*
4. *Commit to limit the proportion of unhealthy (compared with healthy) foods promoted in their regular catalogues*

Product accessibility

1. *Support evidence-informed government policies such as a tax on sugar-sweetened beverages*
2. *Commit to limit multi-buy specials (e.g. two for one) on unhealthy foods*
3. *Commit for checkouts to be free from unhealthy items*
4. *Commit to limit the placement of unhealthy items (such as confectionery, chocolate and soft drinks) at end of aisle displays or other high-traffic areas*

Relationships with other organizations

1. *Publish all national relationships and funding for external research on the Belgian website*
2. *Disclose all political donations in real time, or commit to not making political donations*

The company has a strategic document or collection of documents that outline the company's overarching commitment to population nutrition and health. This may include mission statements, strategies and/or overarching policies that are publicly available and apply to the national context.

Median score
57/100

Key findings

This is the best performing domain of the BIA-Obesity

2 out of the 31 companies did not have any corporate population nutrition strategy, while one company (Lidl) achieved the maximum score for this BIA-Obesity domain.

5 out of 31 companies had regular, publicly available national reports including reporting against objectives and targets.

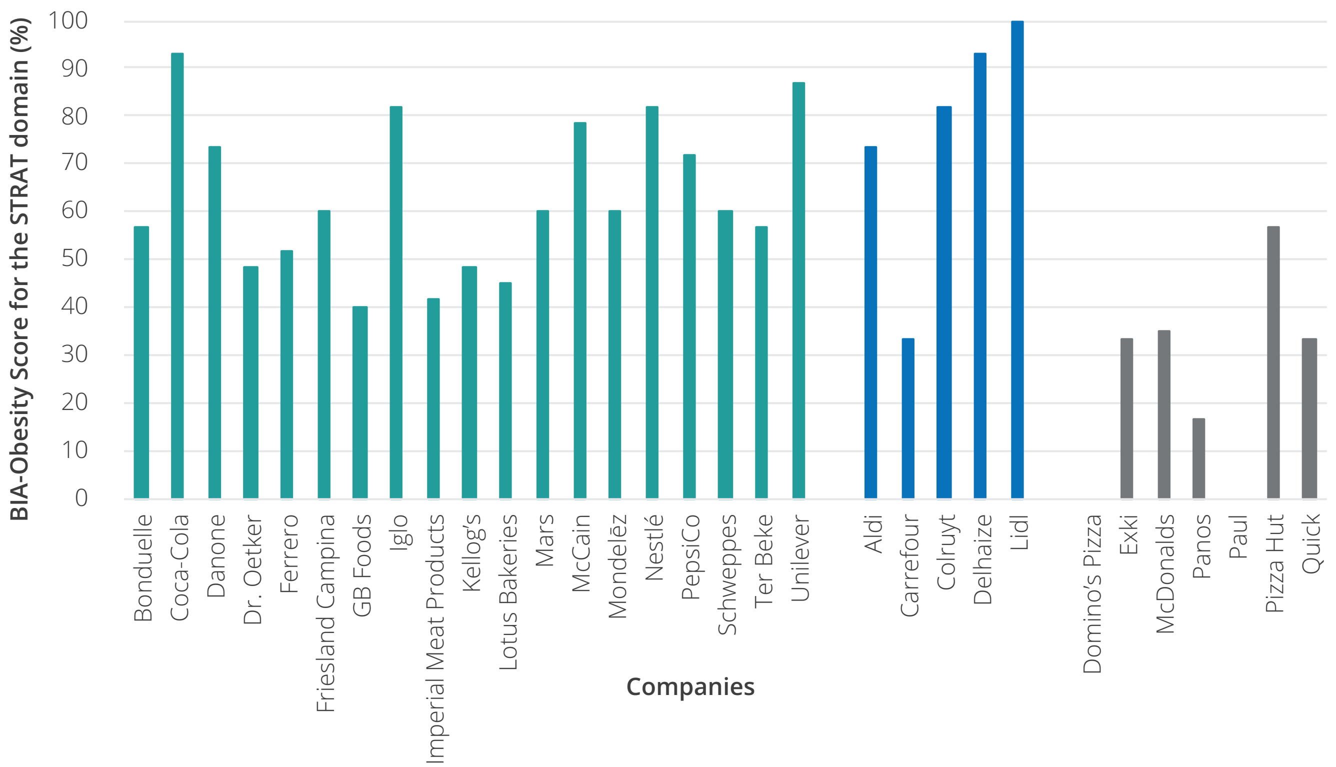
Supermarkets (median score 82%) performed better than packaged food and beverage manufacturers (median score 60%) and quick service restaurants (median score 33%) for this domain

Some companies recognized both national (i.e. Convention Balanced Diets, Nutri-Score) as well as international (i.e. The United Nations Sustainable Development Goals or the World Health Organization global NCD action plan) priorities within their corporate nutrition strategy.

Some companies published annual national reports detailing their progress against their objectives and targets. Other companies had limited disclosure of specific progress in meeting objectives and targets.

Most companies did not identify population nutrition as a clear priority focus area however, when compared to environmental and social priorities.

Findings by domain | **A. Corporate population nutrition strategy**



Recommendations for action

Identify population nutrition as a clearer priority focus area for the company, with relevant objectives, targets and appropriate resourcing

Refer to international (i.e. The United Nations Sustainable Development Goals or the World Health Organization global NCD action plan) priorities within the corporate nutrition strategy

Report progress against specific population nutrition targets and objectives on a regular basis

Participate in / implement a strategy to adopt relevant recommendations from government-led programs or international recommendations to improve the healthiness of food environments, including nutritional quality of product portfolio, health-related labelling of food products (i.e. Nutri-Score) and restrictions on unhealthy food marketing to children.

The company has a set of product formulation commitments relating to new product development and reformulation of existing products to limit or reduce nutrients of concern (including sodium, saturated fat, trans fat and added sugars) and reduce energy content per serving / provide smaller portion sizes.

Median score

37/100

Key findings

This is the second best scoring BIA-Obesity domain; only two companies had no commitments in this domain

No companies obtained the maximum score for this domain while two companies (Domino's Pizza, Paul) did not have any commitments on product formulation.

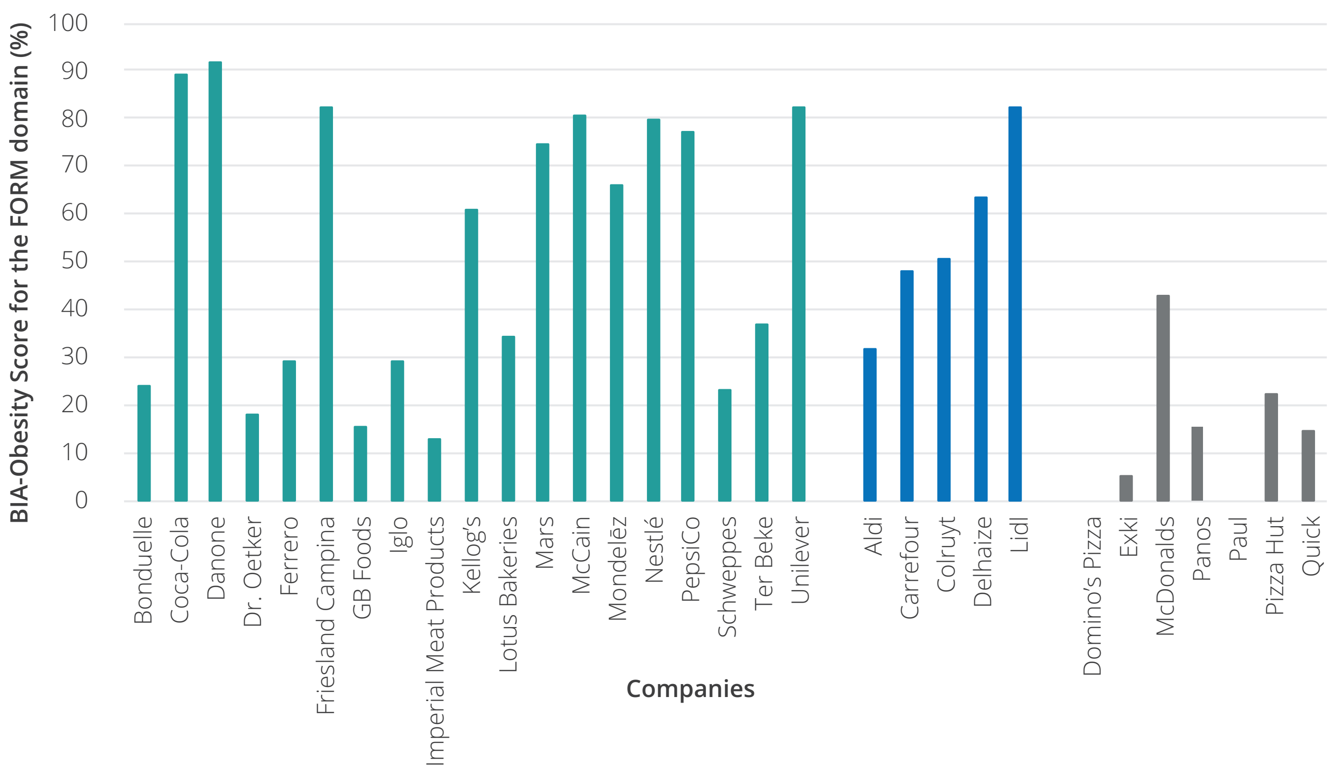
The best performing company, Danone, committed to reduce salt, saturated fats, sugar and energy content of food products through "Danone Nutritional Targets 2020"

About 13 of the 19 packaged food and non-alcoholic beverage manufacturers and all of the supermarkets were signatories to the Convention for a balanced diet.

2 out of 19 food and non-alcoholic beverage manufacturers and two out of five supermarkets already utilized Nutri-Score to guide their reformulation efforts

14 out of 19 food and non-alcoholic beverage manufacturers and all supermarkets had targets in relation to reducing added sugar content, while 15/19 food and non-alcoholic beverage manufacturers and all supermarkets had targets in relation to reducing sodium content.

8 out of 19 food and non-alcoholic beverage manufacturers and two out of five supermarkets had targets in relation to reducing portion sizes where relevant, while only one out of seven quick service restaurants had such targets.



Recommendations for action

Develop SMART (specific, measurable, achievable, relevant and time-bound) targets for the reduction of nutrients of concern (sodium, added sugar, saturated fat, energy) in food products across the portfolio. Routinely report on progress in achieving those reformulation targets.

Develop portion size reduction targets for food categories where this is relevant

Utilize the Nutri-Score front-of-pack labelling system and nutrient profiling system to guide reformulation efforts

The company has a set of published commitments relating to nutrition labelling that are designed to inform consumers about the nutrient composition of products, including nutrition content claims, implementation of interpretive front-of-pack labelling, and the provision of comprehensive online nutrition information.

Median score

32/100

Key findings

Some companies were demonstrating clear commitments in the area of nutrition labelling, including implementation of the Nutri-Score front-of-pack labelling system and/or providing nutrition information about foods and meals online

No companies obtained the maximum score for this domain while one company (Imperial Meat Products) did not have any commitments for product labelling.

Supermarkets are clearly performing much better within this domain (median score 55%) compared to packaged food and beverage manufacturers (median score 29%) and quick service restaurants (median score 18%).

The top performer in this domain (Delhaize) committed to introduce the government-endorsed Nutri-Score System on their own-brand packaged food products, and provided both on-shelf and online Nutri-Score for all products (not just their own-brand products) in-store.

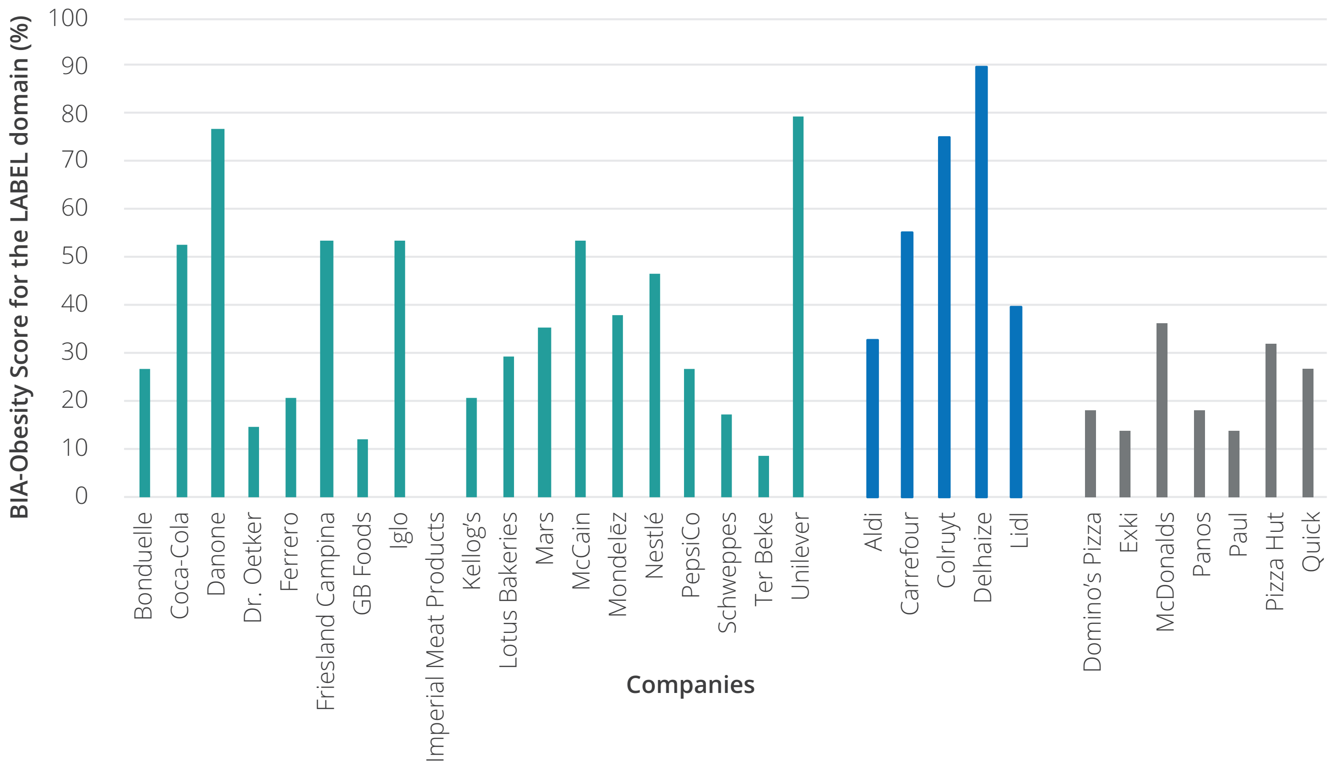
6 out of 19 packaged food and non-alcoholic beverage manufacturers and all supermarkets committed to implement the government-endorsed Nutri-Score System on their products on their own-brand products within two years

All quick service restaurants provided nutritional information about food and meals online to some extent, although sometimes only per serve instead of per 100g, but none of them committed to labelling their menu boards in-store.

One company (Unilever) has a public commitment not to display nutrition claims on products that are unhealthy.

Findings by domain

C. Nutrition labelling



Recommendations for action

Commit to implement the Nutri-Score system across all products, with specific roll-out plan and timelines (packaged food and beverage manufacturers)

Support the mandatory implementation of the Nutri-Score in the EU region

Commit to provide calorie labelling for foods and meals on-site (quick service restaurants) or Nutri-Score shelf tags in-store (supermarkets)

Introduce a policy to only make nutrition and health claims (e.g., '99% fat free') on products that are classified as 'healthy' (using Nutri-Score or other independent nutrient profiling scoring criterion)

The company has a comprehensive policy/commitment to reduce the exposure of children and adolescents to 'less healthy' food marketing. This policy includes marketing of 'less healthy' foods in-store, online, in broadcast and non-broadcast media, and all marketing techniques designed to appeal to children and adolescents. Compliance with this policy is audited by third party auditors on a regular basis. The company also commits to practice responsible marketing to all consumers, including limits on promotion of 'less healthy' products in-store and in catalogues.

Median score

36/100

Key findings

Some companies publically committed to compliance with the Belgian Pledge

8 out of 31 companies had no commitments in this domain, mostly quick service restaurants.

One quick service restaurant company (Exki) obtained the maximum score in this domain because they specifically commit to not advertise at all.

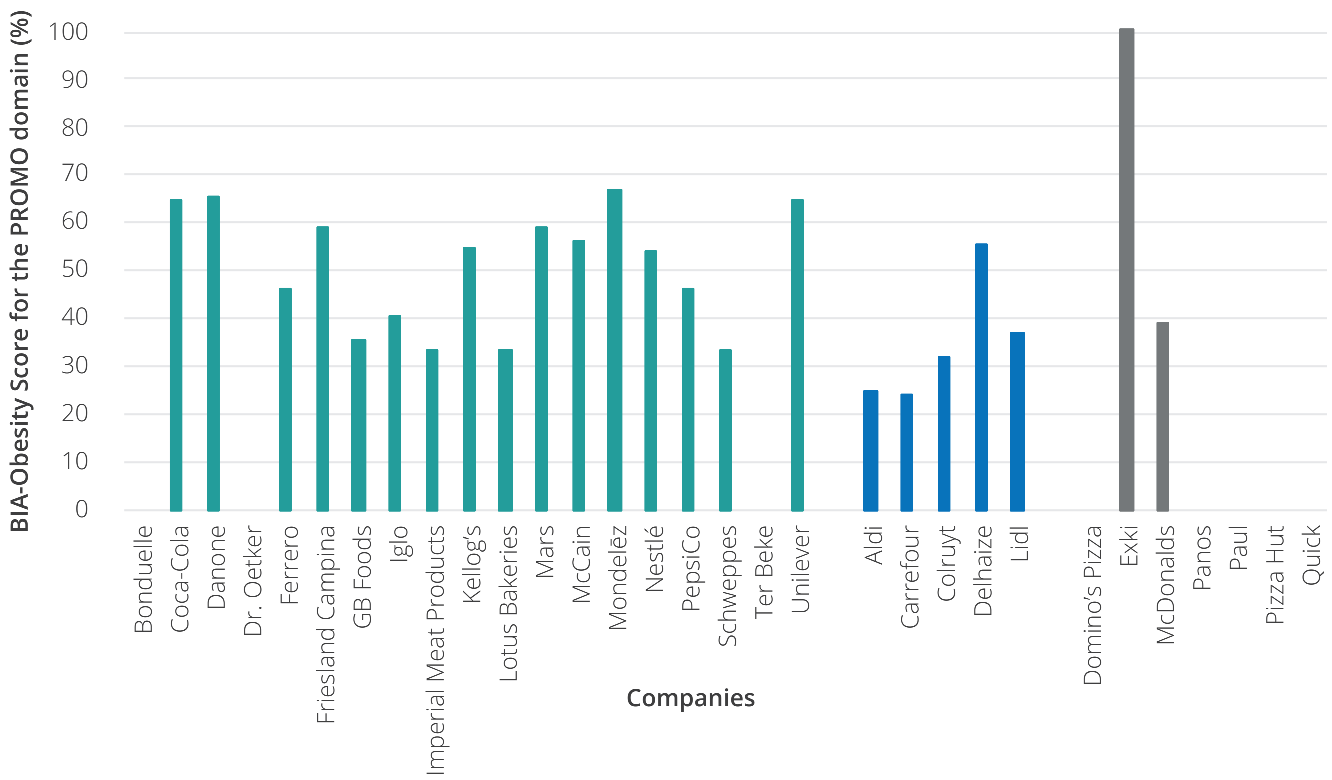
4 out of 19 packaged food and beverage manufacturers committed not to sponsor children's sporting, cultural or other activities using unhealthy foods and brands. Apart from Exki, none of the quick service restaurants made such a commitment.

Four companies explicitly opposed government restrictions on unhealthy food marketing to children; while one supermarket expressed some support for government restrictions on unhealthy food marketed to children and quick service restaurants neither supported or opposed such restrictions.

No companies had developed formal responsible marketing to children policies that would effectively restrict the exposure of children and adolescents to 'less healthy' food promotion.

No companies had developed marketing policies for children up to 18 years of age.

D. Product and brand promotion



Recommendations for action

Implement a marketing to children policy that effectively restricts the exposure of children and adolescents (up to age 18) to promotion of 'less healthy' foods across broadcast and non-broadcast media, using government-endorsed standards for defining 'less healthy' foods, such as the WHO Europe nutrient profile model. Routinely report on compliance with the policy.

Commit to increase the proportion of healthy products (using government guidelines for defining 'healthy' foods) featured in catalogues and other advertising

Eliminate use of promotion techniques (e.g., cartoon characters, interactive games) with strong appeal to children in relation to 'less healthy' products

E. Product accessibility

The company has a commitment to address the availability and affordability of healthy products relative to their 'less healthy' counterparts. This includes commitments around pricing, positioning and display of healthy compared to 'less healthy' products, and availability of healthy compared to 'less healthy' products

Median score

8/100

Key findings

Companies had few commitments to restrict accessibility of 'less healthy' foods and improve accessibility of healthy foods; this is the worst scoring BIA-Obesity domain.

Product accessibility was the worst performing BIA-Obesity domain, with few clear commitments to address the accessibility of healthy compared to 'less healthy' products.

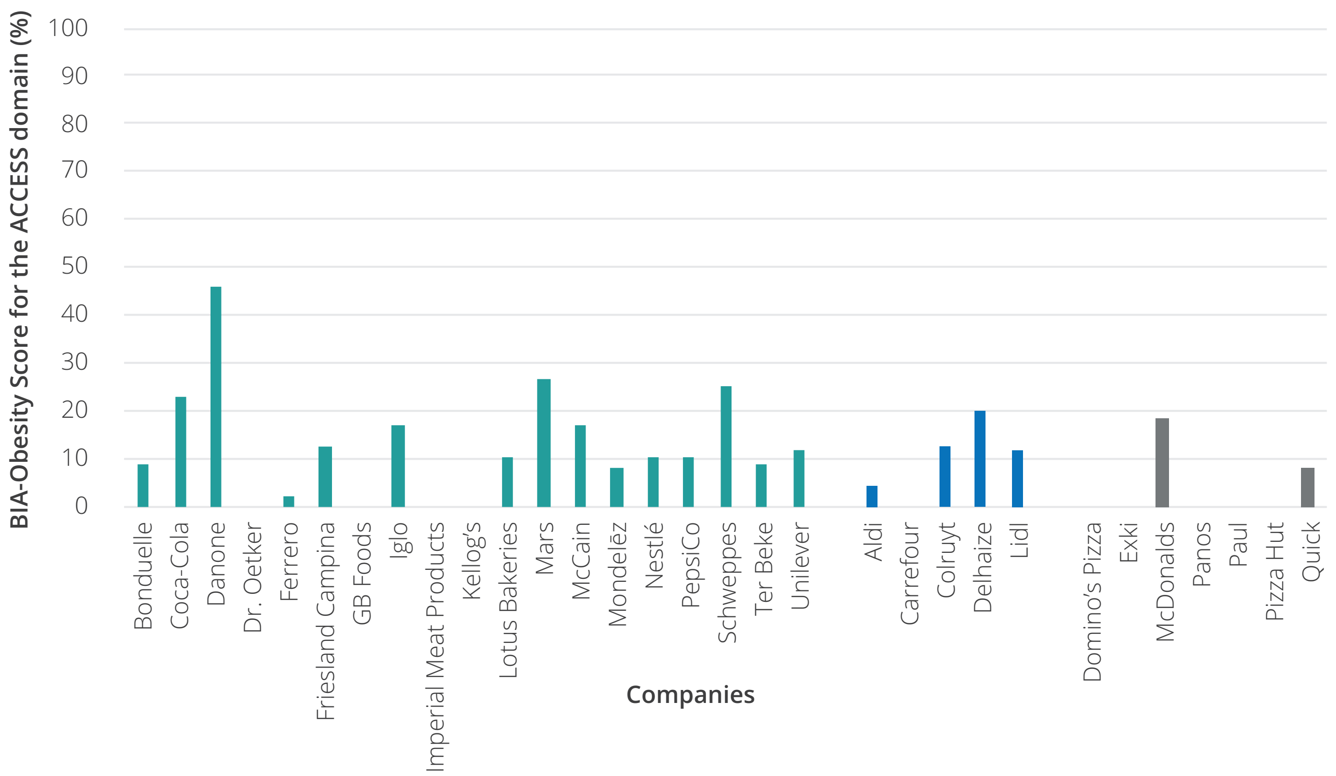
10 out of 31 companies did not have any commitments in this domain.

One of the quick service restaurants (McDonald's) committed to not provide free refills for soft drinks.

One of the supermarkets (Delhaize) committed to provide price promotions for healthy foods (Nutri-Score A and B products) either in-store or through their loyalty programme

One of the supermarkets (Colruyt) had a commitment that checkouts are free from unhealthy items (including confectionery, chocolate and soft drinks)

Two of the packaged food and non-alcoholic beverage manufacturers (Danone, Schweppes) supported the implementation of taxes on certain unhealthy food products, while 7 packaged food and beverage manufacturers opposed, none of the supermarkets and quick service restaurants opposed fiscal policies.



Recommendations for action

Support the position of the World Health Organization on fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive

Introduce a commitment to increase the number/proportion of healthy products in the company's portfolio

Limit price promotions (particularly 'buy-one-get-one-free' and 'buy two and save') on 'less healthy' products

Increase the proportion of 'healthy' products displayed in high-traffic areas (e.g., end-of-aisle displays)

Consistently link rewards through loyalty programs to healthier purchases

Introduce universal healthy checkouts (with no confectionery or sugar-sweetened beverages) across all stores nationally

Commit to not provide free refills for caloric soft drinks / soda

Commit to not open new quick service restaurants near primary and secondary schools

F. Relationships with other organizations

The company has a policy or document(s) that outlines the types of relationships with external organisations that the company will engage in. The company adopts full transparency regarding the amount and type of external support provided to external organisations.

Median score

33/100

Key findings

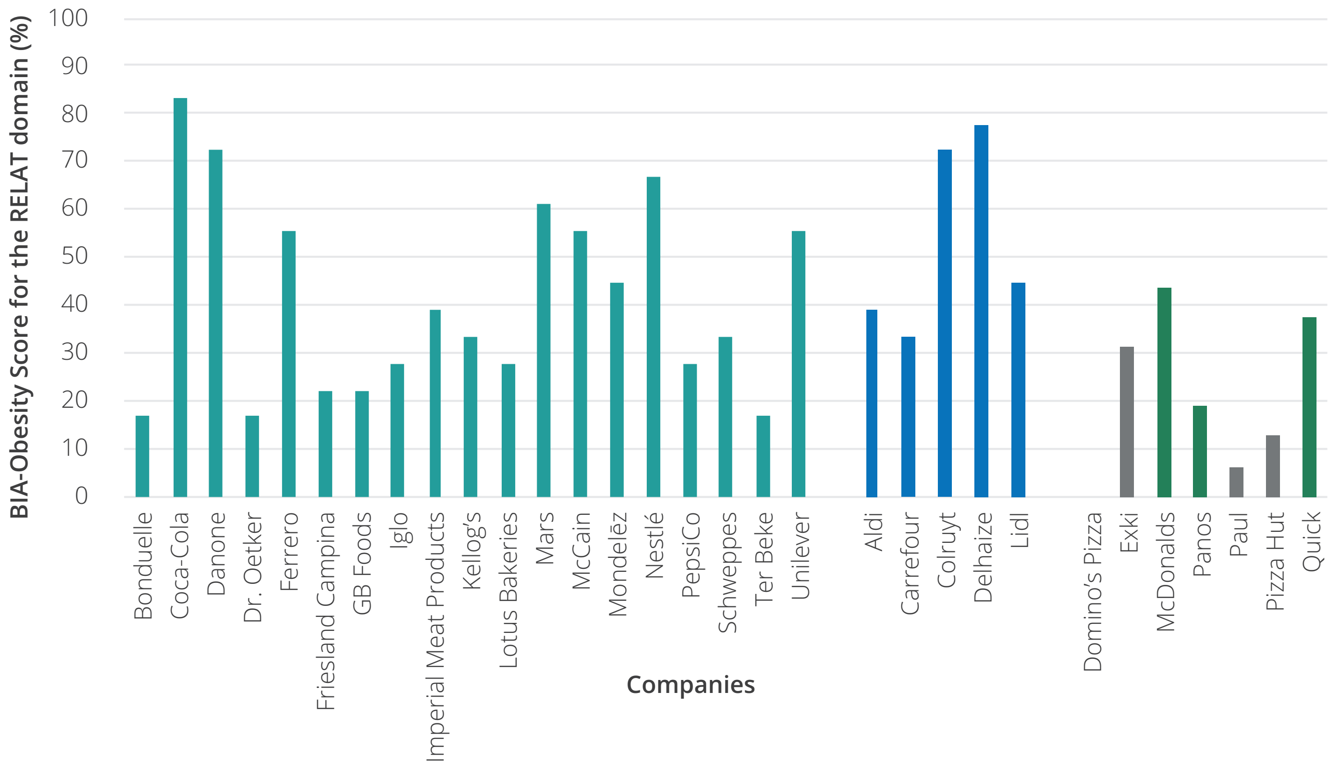
Most companies have adopted some transparency around relationships with external organizations

None of the companies obtained the maximum score for this domain and declared all relationships, support for research and political donations (if any) on their national website.

One company did not have any commitments (Domino's Pizza) for this domain

Some companies specifically committed to not making any political donations

Findings by domain | **F. Relationships with other organizations**



Recommendations for action

Disclose relationships (including funding and support) with external groups (e.g., professional organisations, research organisations, community and industry groups) related to health and nutrition

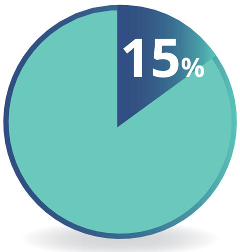
Disclose all political donations in real time, or commit to not make political donations

DISCUSSION AND IMPLICATIONS

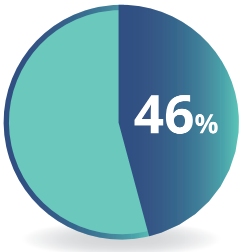
This study assessed for the first time the commitments and practices related to obesity prevention and population nutrition of the major food companies in Belgium. The findings show that there is a large variation in the overall scores (0-75%) for the transparency, comprehensiveness and specificity of commitments, and that more than half of the companies selected engaged with the BIA-Obesity tool and process. The best performing domain was 'Corporate nutrition strategy' while the worst performing domain was 'Product accessibility'. The overall scores ranged from 2% to 75%, with a median overall score of 35%.

The median overall score was

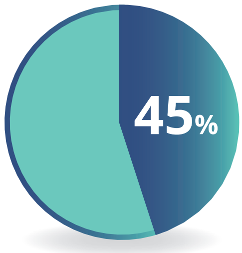
for quick service restaurants



for supermarkets

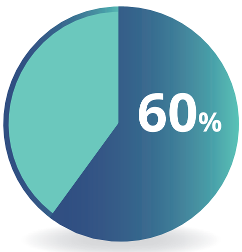


for packaged food and non-alcoholic beverage manufacturers



In general, performance metrics related to food formulation and marketing were not associated with the overall BIA-Obesity score on commitments. This monitoring study offers key insights for companies about areas where they are doing well and areas where improvements are needed, especially compared to other companies in Belgium. The main aim is for this assessment to be repeated over time so that specificity, comprehensiveness and transparency of company commitments can be improved in order to improve industry practices related to food formulation, labelling, marketing and accessibility.

In general, it is recommended for population nutrition to become a priority focus within the corporate strategy and to have specific targets and objectives linked to key performance of senior managers with regular reporting and appropriate resources. In addition, all companies should be fully transparent about relationships with external organizations, political donations (if any) and research they fund. Food companies across sectors are encouraged to seriously improve commitments and practices in the domains of product and brand promotion to children and product accessibility.

About 

of the companies fully engaged in the assessment.

Since this is the first assessment, it is anticipated that more companies will engage with the assessment next time. Companies who engaged in the assessment were able to significantly improve their scores and the average score of companies who fully engaged was significantly higher than the average score of companies who did not fully engage with the tool and process. Some companies mentioned the assessment to be burdensome. Therefore, it has to be explored how the assessment can be simplified in the future.

This study has measured commitments and transparency and to a limited extent performance, mainly in relation to the healthiness of company portfolios or extent and nature of unhealthy food marketing to children. In a next iteration of the BIA-Obesity Belgium, a wider variety of performance metrics needs to be assessed as well as changes over time in those performance metrics to also evaluate the extent of company efforts over time.

The company scorecards are available as a separate attachment to this report. In those scorecards each company can benchmark their commitments and performance against those from other companies within their sector. Key strengths and recommendations are identified to support companies to take further actions to improve their nutrition-related commitments.

CONCLUSION

While Belgian food companies have taken some steps as part of a societal response to unhealthy diets and obesity, there is a much greater role for them to play. The overall and domain-specific BIA-Obesity scores show that there is a lot of room for food companies across all four sectors to

improve comprehensiveness, specificity and transparency

of their nutrition-related commitments, as well as their practices related to population nutrition, in particular in relation to product and brand promotion and product accessibility.

This first BIA-Obesity assessment for Belgium provides tailored recommendations for each company to support them to improve their commitments as well as their practices.

This process will be repeated regularly to assess progress over time. The next phases of the BIA-Obesity should include a wider list of performance metrics of companies in relation to product formulation, labelling, promotion and accessibility.

In view of these results, it is clear that stronger government regulations on food environments will be essential to achieve the goals of the World Health Organization action plan on chronic diseases as well as the Sustainable Development Goals.

However, as an important actor, the food industry needs to make bolder and more specific, comprehensive and transparent commitments and improve their reformulation, labelling and marketing practices in Belgium.

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