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

Company assessments and recommendations using the 'Business Impact Assessment on Obesity and Population Nutrition' (BIA-Obesity)

FRANCE 2021

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

Authors: Iris Van Dam, Stefanie Vandevijvere, Sciensano

Legal Depot: D/2021/14.440/83

sciensano

stop
Science and Technology in childhood Obesity Policy

INFORMAS
Benchmarking food environments

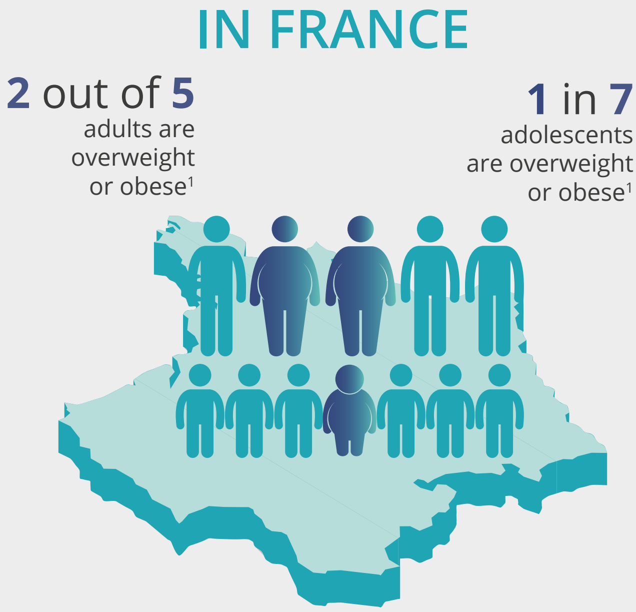
SUMMARY

Overview

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

Overweight and obesity contribute significantly to rates of disease (cancers, diabetes, heart disease, strokes) and death in France. 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.



Project aims

This project aims to contribute to efforts to improve the healthiness of French 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 French food companies. The objective was to highlight, in the French context, where food companies are showing some leadership, identify areas for improvement, and make specific recommendations tailored by policy domain, sector and company.

Assessment Methods

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 benchmark 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 France (N=33) were selected for assessment across four sectors: **packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets and quick service restaurants**. The assessment included commitments until *31 December 2020*. For practices, the time frame depended on data availability.

Process

Publicly available information on commitments was analysed for all 33 selected food companies. This included an analysis of French 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 practices, key areas for improvement and recommendations.

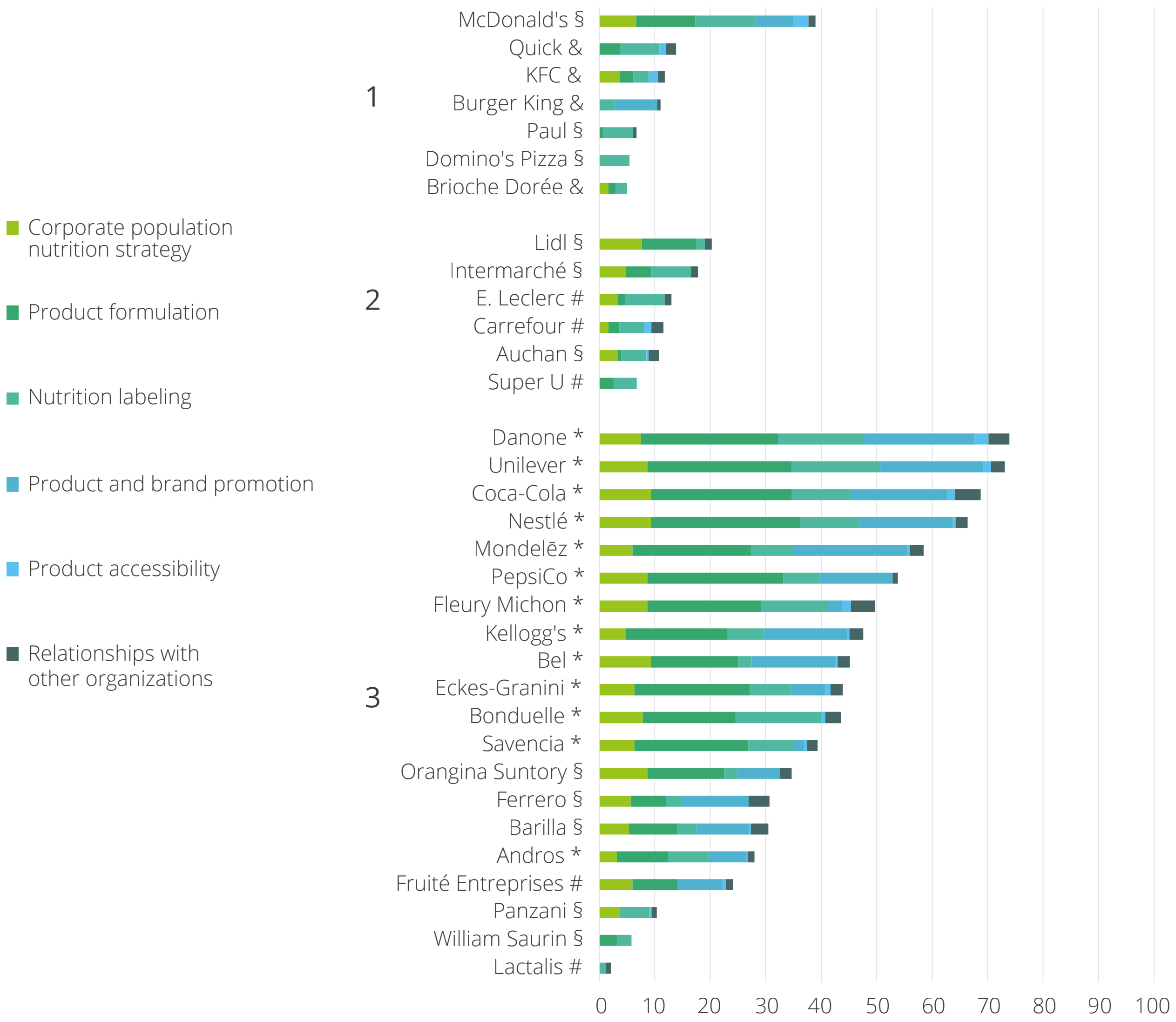
Domains assessed and weighting

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

Company commitments on obesity and population nutrition in France 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), France 2020 – Overall and domain-specific scores for quick service restaurants, supermarkets, packaged food and non-alcoholic beverage manufacturers.
1. Quick service restaurants, **2.** Supermarkets, **3.** Packaged food and non-alcoholic beverage manufacturers.
** Full engagement with the process (N=13); # Declined participation (N=5); § Accepted participation, but contributions not received in time (N=11); & Not able to contact the company (N=4); For #, § and &: Assessment of commitments was based on publically available information only.*

French food companies demonstrated some commitment to improving population nutrition, but much stronger actions are needed across sectors and across BIA-Obesity policy domains. In 2020, the best performing domain was *'Corporate population nutrition strategy'* while the worst performing domain was *'Product accessibility'*. The overall scores ranged from 2% up to 74% with a median overall score of 28%. The median overall score was 12% for supermarkets, 11% for quick service restaurants and 44% for packaged food and beverage manufacturers. About 13 (39%) of the selected companies fully engaged with the BIA-Obesity process and provided feedback and validation in time. For companies not engaging with the process and declining participation, the assessment was based on publically available information only.

SUMMARY

Company practices on food formulation & marketing in France 2020

For each sector, for several of the BIA-Obesity domains (in particular *'Product formulation'* and *'Product and brand promotion'*), in addition to scoring the commitments, several 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[2]	WORST PERFORMING COMPANY[2]
PRODUCT FORMULATION	*Full company food product portfolio:*	2018		
	• Mean (standard deviation) salt content[1] (g/100g)		Danone: 0.2 (0.9)	Unilever: 2.3 (6.4)
	• Mean (standard deviation) total sugar content (g/100g)		William Saurin: 0.9 (0.6)	Ferrero: 49.8 (19.8)
	• Mean (standard deviation) saturated fat content[1] (g/100g)		Bonduelle: 0.5 (0.6)	Savencia: 16.7 (9.7)
	• Mean (standard deviation) energy content (kj/100g)		Coca-Cola: 131.1 (77.5)	Ferrero: 2134.2 (364.1)
	• Median Nutri-Score[2]		Bonduelle: A	Ferrero, Mondelēz: E
	• % of products with Nutri-Score A and B		Eckes-Granini: 95.3%	Ferrero: 0.6%
	• % of products with Nutri-Score D and E		Bonduelle: 0.5%	Ferrero: 97.6%
	• % of products that are ultra-processed		Eckes-Granini: 4.7%	Ferrero: 100%
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: 7.5%	Eckes-Granini and Ferrero: 100%

1. Excluding Coca-Cola, Orangina Suntory, Eckes-Granini, Fruité Entreprises and Andros which mainly sell non-alcoholic beverages.
2. As calculated using Open Foods Facts data.

Quick service restaurants

BIA-OBESITY DOMAIN	PERFORMANCE INDICATOR(S)	YEAR	BEST PERFORMING COMPANY[1]	WORST PERFORMING COMPANY[1]
PRODUCT FORMULATION	*Full company food product portfolio:*	2019		
	• Mean (standard deviation) salt content (g/100g)		McDonald's: 0.6 (0.5)	Domino's pizza: 1.0 (0.4)
	• Mean (standard deviation) total sugar content (g/100g)		Domino's pizza: 3.8 (5.5)	Paul: 13.1 (13.2)
	• Mean (standard deviation) saturated fat content (g/100g)		KFC: 2.4 (3.0)	Paul: 5.4 (4.5)
	• Mean (standard deviation) energy content (kj/100g)		KFC: 742.6 (536.7)	Paul: 1143.0 (427.8)
	• Median Nutri-Score[1]		Domino's pizza, KFC, McDonald's: C	Burger King: D
	• % of products with Nutri-Score A and B		KFC: 28.7%	Domino's pizza: 12.6%
	• % of products with Nutri-Score D and E		Domino's pizza: 40.0%	Burger King: 50.9%
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	2019	KFC: 73.9%	Paul: 93.7%

1. As calculated using the nutritional information available on company websites.

SUMMARY

Supermarkets

BIA-OBESITY DOMAIN	PERFORMANCE INDICATOR(S)	YEAR	BEST PERFORMING COMPANY[1]	WORST PERFORMING COMPANY[1]
PRODUCT FORMULATION	*Full own-brand company food product portfolio:*	2018		
	• Mean (standard deviation) salt content (g/100g)		Intermarché: 0.7 (1.1)	Lidl: 1.1 (3.3)
	• Mean (standard deviation) sugar content (g/100g)		Auchan: 9.7 (16.7)	Lidl: 12.7 (17.8)
	• Mean (standard deviation) saturated fat content (g/100g)		Super U: 4.5 (7.6)	Lidl: 6.3 (8.1)
	• Mean (standard deviation) energy content (kj/100g)		Super U: 975.6 (757.8)	Lidl: 1135.9 (760.4)
	• Median Nutri-Score[1]		Auchan, Carrefour, E.Leclerc, Intermarché, Super U : C	ALidl: D
	• % of products with Nutri-Score A and B		Intermarché : 47.7%	Lidl: 26.3%
	• % of products with Nutri-Score D and E		Intermarché : 35.2%	Lidl: 51.7%
	• % of products that are ultra-processed		Intermarché : 52.9%	Carrefour: 64.3%
PRODUCT AND BRAND PROMOTION	*Full own-brand food product portfolio[1]:* % of products not-permitted to be marketed to children according to the WHO-Model	2018	Super U: 66.0%	Lidl: 81.9%
	All food products: % of promotions for food in circulars:	2019-2020		
	• that are ultra-processed		Carrefour Hypermarché: 47.6%	Lidl: 60.8%
	• for fresh fruits and vegetables • with promotional characters • with discount • with incentive offers		Carrefour Market: 7.0% Super U: 0.2% Lidl: 28.7% Carrefour Hypermarché: 0.1%	Auchan: 3.2% Intermarché: 9.1% Auchan: 72.7% Intermarché: 8.4%

1. As calculated using Open Foods Facts data.

Performance indicators for other BIA-Obesity domains, such as *'Nutrition labelling' and 'Food accessibility'*, will be collected in a next iteration of the BIA-Obesity France. Currently, no suitable data were available for these BIA-Obesity domains. The Nutri-Score, as mentioned in the table above, was solely used to assess the median healthiness of product portfolios and is unrelated to commitments regarding on-pack labelling practices.

Commitments versus performance for the different sectors in France 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 promotion'*). This means that companies with better commitments do not necessarily have healthier product portfolios or stricter marketing practices. Neither do companies with less commitments necessarily have less healthy product portfolio's or weaker 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 France 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 French Government endorsed Nutri-Score on packaged food and beverage products as well as online (the latter only for supermarkets)

Quick Service Restaurants

- Providing nutrition information about foods and meals online

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

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 entire 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 products on the menus in-store (for quick service restaurants)*
4. *Provide online nutrition information on a per 100g/ml basis for all products on the menu (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 unhealthy food products (according World Health Organisation Regional Office for Europe nutrient profile) across media and settings*

Product accessibility

1. *Support evidence-informed fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive taking into account the growing scientific evidence base*
2. *Make a commitment to increase the proportion of healthy food products in the overall company product portfolio*

Relationships with other organizations

1. *Publish all relationships with other organizations and funding for external research on the French website*

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

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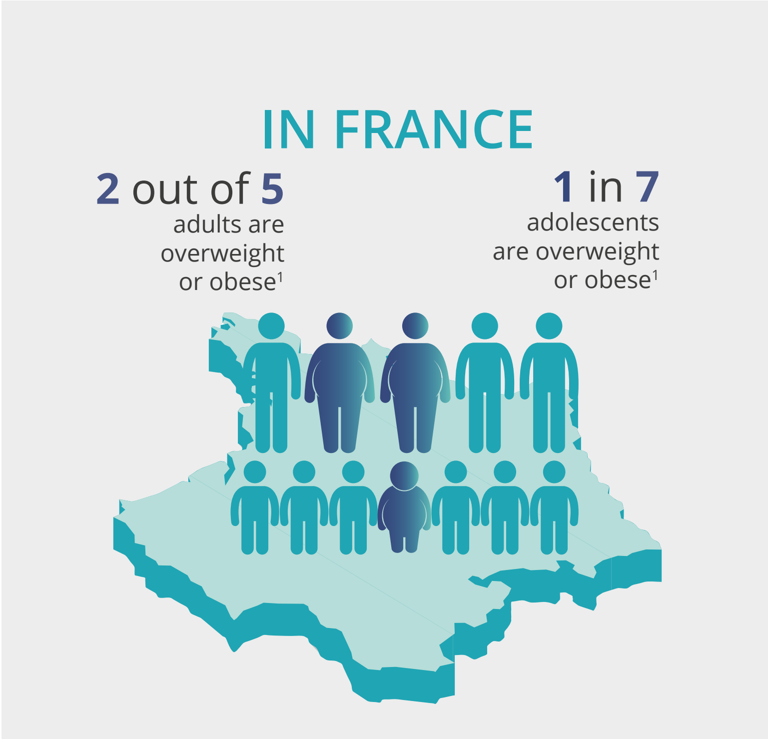
Unhealthy diets and obesity are leading contributors to poor health in France

Obesity and diet-related diseases are major public health problems in France[1]. French people consume about one third of their energy from ultra-processed food products[2]. Two out of five French 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 on 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 France 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. Phase 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 food industry sectors in France.

1. www.healthdata.org/france
2. https://www.mdpi.com/2072-6643/13/2/682
3. French Health Interview 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

Study aims

This study assessed the largest French 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 French 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 December 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 information
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 French 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/

METHODS

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 'assigned' drink and side items included as part of combination meals 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
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
F	**Relationships with other organizations**	Policies 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

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[1]	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%

1. www.informas.org

Assessment of performance

For some of the BIA-Obesity policy domains, a set of key performance indicators was selected to assess company 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 domains *'Nutrition labelling'* and *'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.

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	Open Food Facts data France[1]	2018

1. Verified using Mintel GNPD (Global New Products Database) data, or nutritional values from brand or supermarket websites.

BIA-Obesity Domain	Performance indicator(s)	Data sources	Years
PACKAGED FOOD AND NON-ALCOHOLIC BEVERAGE MANUFACTURERS			
Nutrition labelling	/	/	/
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)	Open Food Facts data France[1]	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	2019
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	Websites	2019
Product accessibility	/	/	/
Relationships with other organisations	/	/	/
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	Open Food Facts data France[1]	2018
Nutrition labelling	/	/	/

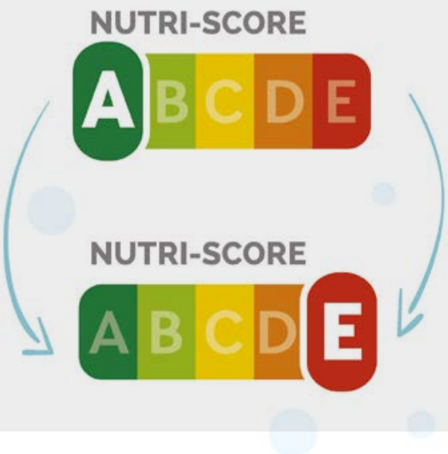
1. Verified using Mintel GNPD (Global New Products Database) data, or nutritional values from brand or supermarket websites.

BIA-Obesity Domain	Performance indicator(s)	Data sources	Years
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	Open Food Facts data France [1]	2018
	All food products: % of promotions for foods that are ultra-processed % of promotions for fresh fruit and vegetables % of promotions with promotional characters % of promotions with discounts % of promotions with incentive offers	Supermarket circulars	October 2019 – March 2020
Product accessibility	/	/	/
Relationships with other organisations	/	/	/

1. Verified using Mintel GNPD (Global New Products Database) data, or nutritional values from brand or supermarket websites.

For packaged food and non-alcoholic beverage manufacturers and supermarkets (own-brand products), the healthiness of the complete product portfolios was analysed using Open Food Facts data for France in 2018. As Open Food Facts cannot guarantee the accuracy and completeness of the data, the nutritional data were verified with Mintel GNPD (Global New Products Database) data, nutritional values found on the brand websites or nutritional values from supermarket websites. Duplication of products was avoided by ensuring that each barcode appeared only once. Nonetheless, if products changed barcode throughout the year or had wrong barcodes assigned within the database it is possible that there is some level of duplication, albeit very limited. Furthermore, it is possible that not all products present on the market in 2018 have been included.

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 French 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 different product within this category were considered.

For quick service restaurants, the nutritional information per 100g was obtained from the national brand websites in 2019, where possible. For Burger King, Domino's Pizza, McDonald's and Paul the nutritional information per 100g could be obtained from the national brand websites. For KFC 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 2018 was used. On the website of Brioche Dorée and Quick no nutritional information was available per 100g and portion sizes were not defined. As a result the product portfolios of Brioche Dorée and Quick 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 France since March 2017. 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. When calculating the Nutri-Score for non-alcoholic beverages, it was assumed that no juices had a fruit and vegetable content above 40% as the classification system applied did not allow for a distinction to be made between the fruit and vegetable content of different juices. To check the viability of this assumption, a correlation was calculated between the Open Food Facts Nutri-Score and the calculated Nutri-Score for non-alcoholic beverages. A strong correlation was observed between both Nutri-scores ($R=0.84$, $p<0.0001$). To check the overall calculations of the Nutri-Score a correlation between the Open Food Facts Nutri-Score and the calculated Nutri-Score for all products was also conducted. A very strong correlation was observed between the calculated Nutri-Score and the Nutri-Score displayed within Open Food Facts ($R=0.98$, $p<0.0001$).

The company's portfolios were also analysed in relation to the proportion of ultra-processed foods (according to the NOVA classification [1]) and products not-permitted to be marketed to children according to the World Health Organisation Europe nutrient profile model (WHO-Model [2]).

For supermarkets, food promotions were collected from all circulars over a six month period (October 2019 – March 2020). Foods promoted were classified according to the WHO-Model categories and the level and purpose of processing per the NOVA classification [1]. Promotional characters (i.e. cartoons, licensed characters), discounts, incentive offers (i.e. gifts or collectables, contests) as well as the proportion of fresh fruits and vegetables within promotions were analysed.

1. Monteiro CA, Cannon G, Levy R, Moubarac J-C, Jaime P, Martins AP, et al. NOVA. The star shines bright. World Nutrition. 2016;7(1–3):28–38.
2. World Health Organization. WHO Regional Office for Europe nutrient profile model. World Health 451 Organization: Geneva, Switzerland. 2015.

Selection of food companies

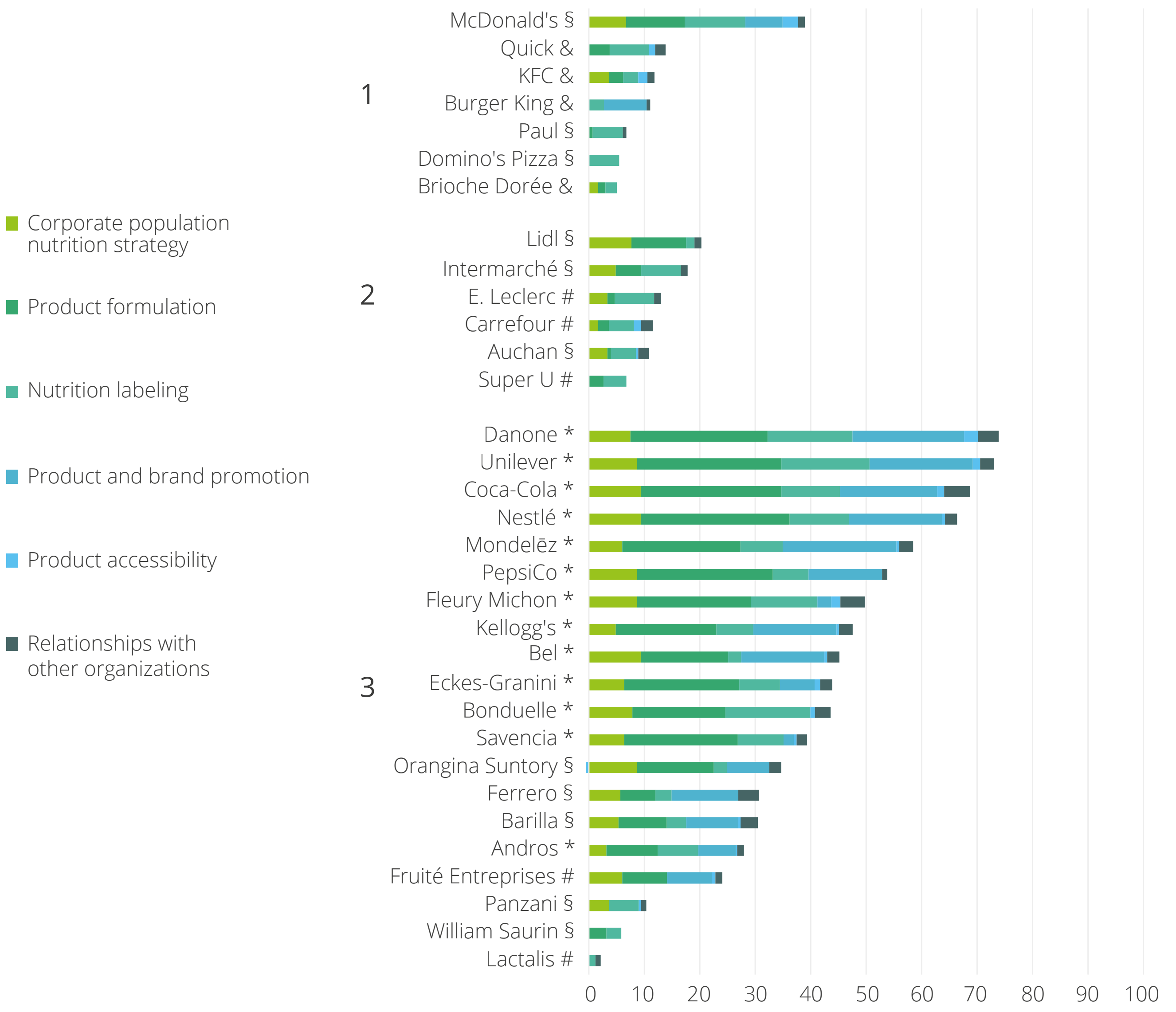
In total, 33 companies (14 packaged food manufacturers, 6 non-alcoholic beverage manufacturers, 6 supermarkets and 7 quick service restaurants), with a combined market share of 22% for packaged food manufacturers, 44% for non-alcoholic beverage manufacturers, 48% for supermarkets and 50% for quick service restaurants, were selected using the 2018 Euromonitor market share data for France. Supermarkets were assessed as a retailer as well as a packaged food and non-alcoholic beverage manufacturer, so their BIA-Obesity scores are a hybrid assessment.

Sector	Market share	Companies included (in order of market share)
Packaged food manufacturers	21.6 % [1]	Lactalis Mondelēz Nestlé Ferrero Fleury Michon Danone Unilever Savencia Bel Panzani Kellogg's Bonduelle Barilla William Saurin
Non-alcoholic beverage manufacturers	43.5% [2]	Coca-Cola PepsiCo Orangina Suntory Eckes-Granini Fruité Entreprises Andros
Supermarkets	47.5%	E.Leclerc Intermarché Carrefour Auchan Super U Lidl
Quick service restaurants	49.7%	McDonald's KFC Quick Burger King Paul La Brioche Dorée Domino's Pizza

1 ,2. Excluding the supermarkets as packaged food or beverage manufacturers (market share of foods: 13.2%; market share of beverages: 8.2%).

Commitments

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



Business Impact Assessment on Obesity and Population Nutrition (BIA-Obesity), France 2020 – Overall and domain-specific scores for quick service restaurants, supermarkets, packaged food and non-alcoholic beverage manufacturers.
** Full engagement with the process (N=13); # Declined participation (N=5); § Accepted participation, but contributions not received in time (N=11); & Not able to contact the company (N=4); For #, § and &: Assessment of commitments was based on publically available information only.*

French 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 population nutrition strategy*' while the worst performing domain was *'Product accessibility'*. The overall scores ranged from 2% up to 74% with a median overall score of 28%. The median overall score was 12% for supermarkets, 11% for quick service restaurants and 44% for packaged food and beverage manufacturers. Generally, overall scores and domain-specific scores were lower for quick service restaurants and supermarkets (considered as both retailer and packaged food and non-alcoholic manufacturer) than for packaged food and beverage manufacturers. In particular the median score for both the domains *'Product and brand promotion'* and *'Product accessibility'* was 0 for quick service restaurants and supermarkets.

For packaged food and non-alcoholic beverage manufacturers, the top scoring companies were companies that fully engaged with the BIA-Obesity tool and process. About 13 (39%) of the selected companies fully engaged with the BIA-Obesity process and provided feedback and validation in time. We were unable to get surveys back in time from 11 out of 33 companies, 5 companies declined participation and 4 out of 33 companies were unable to be contacted. 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 38% (based on publically available information) to 50%. 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 French best available practice examples across different BIA-Obesity domains.

Domain	Company	Country	Examples of best practice commitments
A. Corporate population nutrition strategy	Coca-Cola, Nestlé, Bel	France	Bel, Coca-Cola and Nestlé make clear commitments to improve population nutrition and health, including SMART (specific, measurable, achievable, relevant and time bound) objectives and targets within the overarching nutrition strategy and references to global priorities e.g. World Health Organization recommendations and Sustainable Development Goals. Regular reports are available, including reporting against country-specific objectives and targets.
B. Product formulation	Danone	France	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	Unilever	France	Unilever commits to link the use of nutrition and health claims with the nutrient profile of products applying the Unilever Nutrition Criteria.
	Nestlé, Fleury Michon, Danone		Danone, Nestlé and Fleury Michon publish support for a European wide implementation of the Nutri-Score.
	Nestlé		Nestlé publicly supports the adoption of EU-wide nutrient profiles for nutrition and health claims.
	McDonald's		McDonald's discloses comprehensive nutrition information on in-store ordering machines and the packaging of permanent products.
D. Product and brand promotion	Danone	France	Danone commits to not use marketing in settings where children gather (childcare centres, family and child services) using unhealthy products (according to the Danone Pledge Nutrition criteria). Regardless of the nutritional profile, they will not display product advertisements in and near (around 50m) primary and secondary schools.
E. Product accessibility	Danone	France	Danone discloses its policy position on sugar taxes on the website and supports some forms of taxation on unhealthy food products by government.
F. Relationships with external organizations	Coca-Cola	Global, Including France	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

French 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 and online

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 entire 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 products 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 unhealthy food products (according World Health Organisation Regional Office for Europe nutrient profile) across media and settings*

Product accessibility

1. *Support evidence-informed fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive taking into account the growing scientific evidence base*
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 French website*

There is considerable room for improvement of the transparency, specificity and comprehensiveness of commitments for all 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 (44%) was higher than the median overall score for all companies (28%) (including quick service restaurants and supermarkets). The best performing company was Danone with an overall score of 74% while the worst performing company was Lactalis with an overall score of 2%.

The best performing domain for packaged food and non-alcoholic beverage manufacturers was *'Corporate population nutrition strategy'* 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.
Two of the 20 companies had no *'Corporate population nutrition strategy'*, two had no commitments on *'Product formulation'*, one had no commitments on *'Nutrition labelling'*, four had no commitments on *'Product and brand promotion'*, and four had no commitments on *'Product accessibility'*. Thirteen out of 20 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	63	0-93
FORM: Product formulation	30	58	0-89
LABEL: Nutrition labelling	20	35	0-79
PROMO: Product and brand promotion	30	29	0-68
ACCESS: Product accessibility	5	10	-10-50
RELAT: Relationships with other organizations	5	44	0-94
OVERALL BIA-Obesity score	**100**	**44**	**2-74**

Performance

Nestlé had food products within nine out of the eleven food categories. Coca-Cola (Non-alcoholic beverages) and Fruité Entreprises (Non-alcoholic beverages) in turn only had products within one single food category.

An overview of the proportion of food and beverage products per food category for the selected packaged food and non-alcoholic beverage manufacturers (Source: Open Food Facts data France, 2018).

The table below gives an overview of the best and worst performing company per product category and per nutrient of concern (year=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.

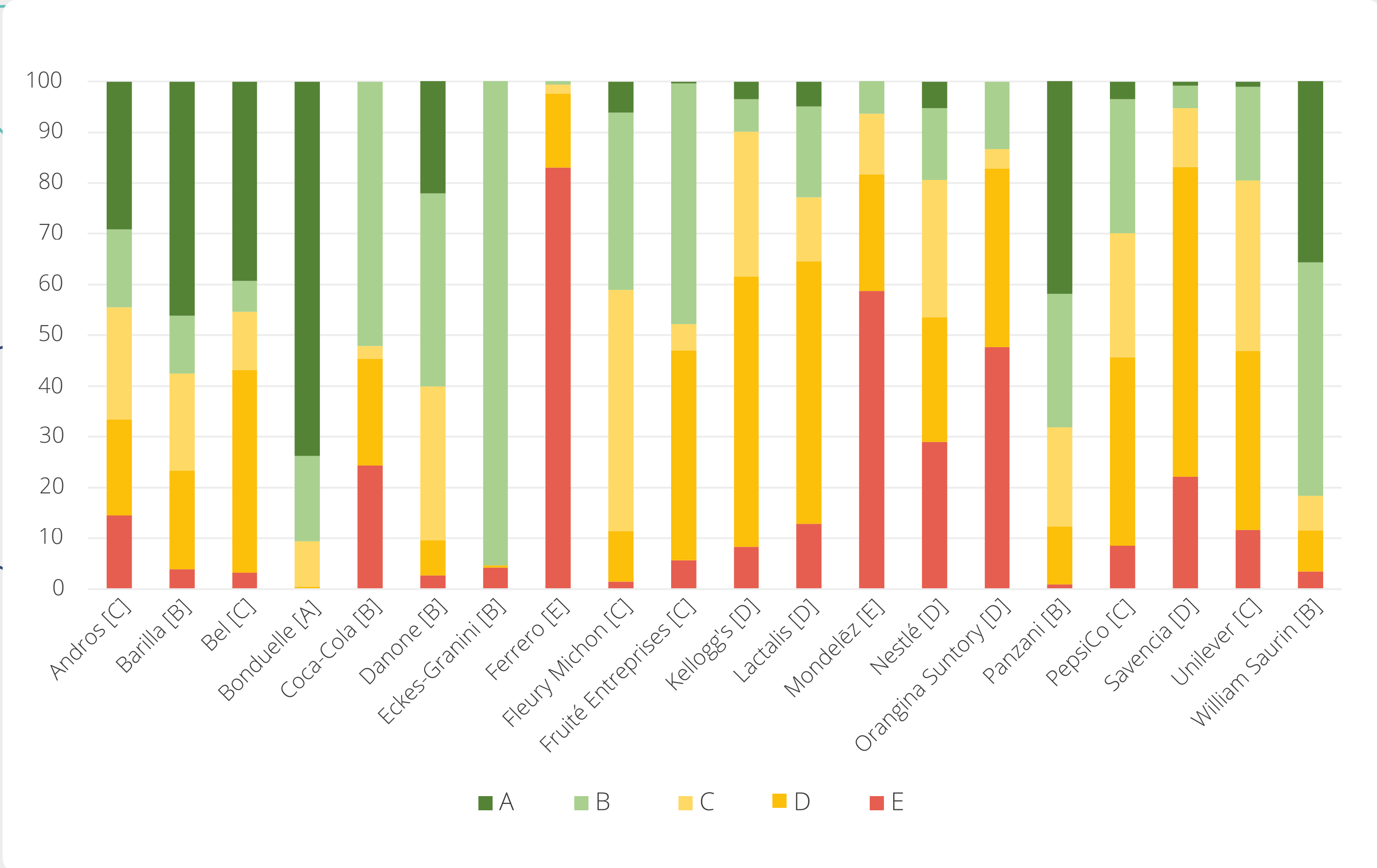
Some companies, such as Bonduelle, Coca-Cola and Eckes-Granini, never appear as best or worst performing company for any product category or nutrient of concern. Panzani in turn reoccurs most often as best performing company across product categories and nutrients (seven times) while Ferrero appears most often as worst performing company (eleven times). Most companies appear both as healthiest or least healthy, depending on product category and nutrient of concern.

The best (top) and worst (bottom) performing packaged food and non-alcoholic beverage manufacturer(s) per product category and per nutrient of concern (Source: Open Food Facts data France, 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	Panzani: 1263 [77]	Panzani: 0.9 [0.2]	PepsiCo: 1.4 [0.2]	Ferrero: 0.4 [0.3]
	Least healthy	Ferrero: 2115 [125]	Ferrero: 38 [7]	Ferrero: 15 [3]	Kellogg's: 2 [4]
Cereal & grain products [3]	Healthiest	Fleury Michon:1063 [18]	Fleury Michon: 2 [0.2]	Fleury Michon: 0.3 [0.1]	Barilla: 0 [0.1]
	Least healthy	Ferrero: 2348 [132]	Ferrero: 45 [6]	Ferrero: 19 [5]	Kellogg's: 0.7 [0.4] Mondelēz: 0.7 [0.3]
Confectionary	Healthiest	Andros: 1338 [71]	Savencia: 40 [12]	Andros: 2 [1.6]	Savencia: 0.1 [0.1]
	Least healthy	Savencia: 2263 [328]	Ferrero: 58 [23]	Savencia: 21 [5]	Andros: 2 [3]
Convenience Foods	Healthiest	PepsiCo: 189 [55]	William Saurin: 0.9 [0.6]	PepsiCo: 0.4 [0.2]	PepsiCo: 0.6 [0.1]
	Least healthy	Barilla: 1408 [321]	Barilla: 4 [3]	Nestlé: 3 [2]	Nestlé: 2 [1]
Dairy	Healthiest	Danone: 369 [167]	Savencia: 2 [3]	Orangina Suntory: 0.9 [2]	Orangina Suntory: 0.1 [0.1]
	Least healthy	Ferrero: 1340 [395]	Ferrero: 25 [7]	Savencia: 17 [7]	Bel: 2 [1]
Fruits & Vegetable products [4]	Healthiest	Unilever: 210 [258]	Panzani: 2 [2]	Andros: 0 [0.3]	Andros and Bel: 0 [0.1]
	Least healthy	PepsiCo: 2384 [212]	Andros: 28 [19]	PepsiCo: 6 [3]	Unilever: 9 [16]
Meat & Fish products	Healthiest	Fleury Michon: 568 [216]	Panzani: 0.8 [0.4]	Fleury Michon: 2 [2]	Panzani: 0.6 [0.8]
	Least healthy	William Saurin: 962 [451]	Savencia: 2 [1]	William Saurin: 7 [4]	Savencia: 2 [1]
Non-alcoholic beverages	Healthiest	Unilever: 40 [197]	Unilever: 1 [5]	Several companies: 0	Several companies: 0
	Least healthy	Fruité Entreprises: 575 [583]	Fruité Entreprises: 33 [34]	Nestlé: 0.8 [3]	Several companies: 0.1
Sauces	Healthiest	Panzani: 375 [319]	Lactalis: 3 [1]	Panzani: 1 [2]	Ferrero: 0.2 [0.2]
	Least healthy	Ferrero: 2249 [37]	Ferrero: 56 [4]	Bel: 15 [6]	Mars: 4 [6]
Savoury Snack Foods	Healthiest	Savencia: 1186 [334]	Savencia: 2 [1]	Barilla: 3 [2]	Savencia: 1 [0.1]
	Least healthy	PepsiCo: 2121 [325]	Mondelēz: 6 [2]	Danone: 11 [12]	Barilla: 2 [0.4]

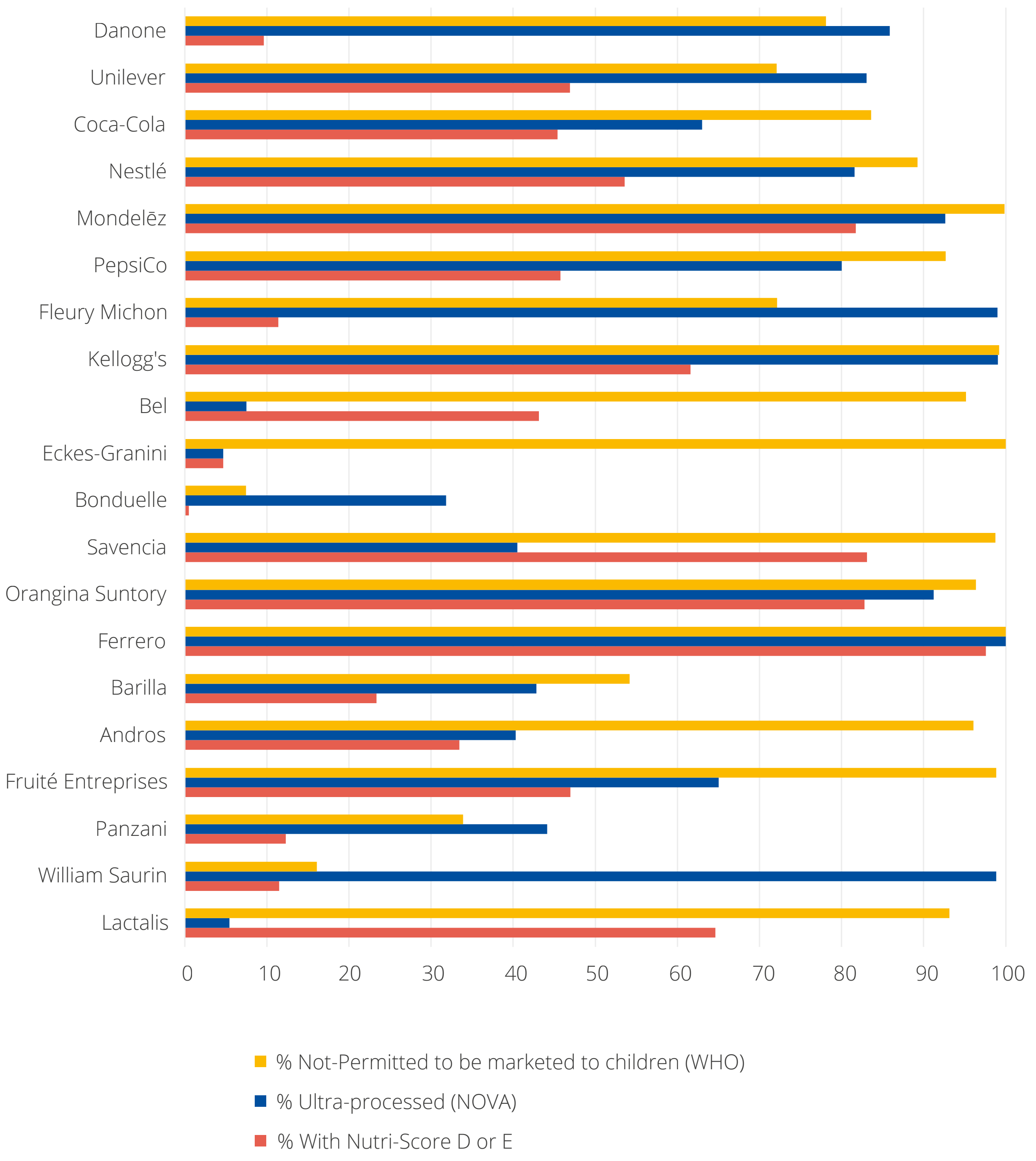
1. Only companies with more than one product within the specific product category were taken into account.
2. The product category 'Edible oils & emulsions' was not included as few companies have it as part of their portfolio.
3. Including 'baking soda', belonging to the category 'Cereal & grain products' 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 (73.7%), while the company with the highest proportion of Nutri-Score E products was Ferrero (83%). The companies with the lowest proportion of Nutri-Score A products (0%) were Coca-Cola, Eckes-Granini, Ferrero, Mondelēz and Orangina Suntory. The company with the lowest proportion of Nutri-Score E products (0%) was Bonduelle, closely followed by Panzani (1%) and Fleury Michon (1.5%). Out of the 20 companies, one company had median Nutri-Score A, while two 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 (Source: Open Food Facts data France, 2018).

For one out of 20 companies (Ferrero), the entire portfolio (100%) was composed of ultra-processed food products, closely followed by Kellogg's, Fleury Michon and William Saurin (99%). Two companies (Eckes-Granini and Ferrero) only had products in their portfolio that were not-permitted to be marketed to children according to the WHO-Model. Other companies of which the portfolio nearly entirely consisted of not-permitted products were Kellogg's (99.2%), Mondelēz (99.8%) and Savencia (98.8%).

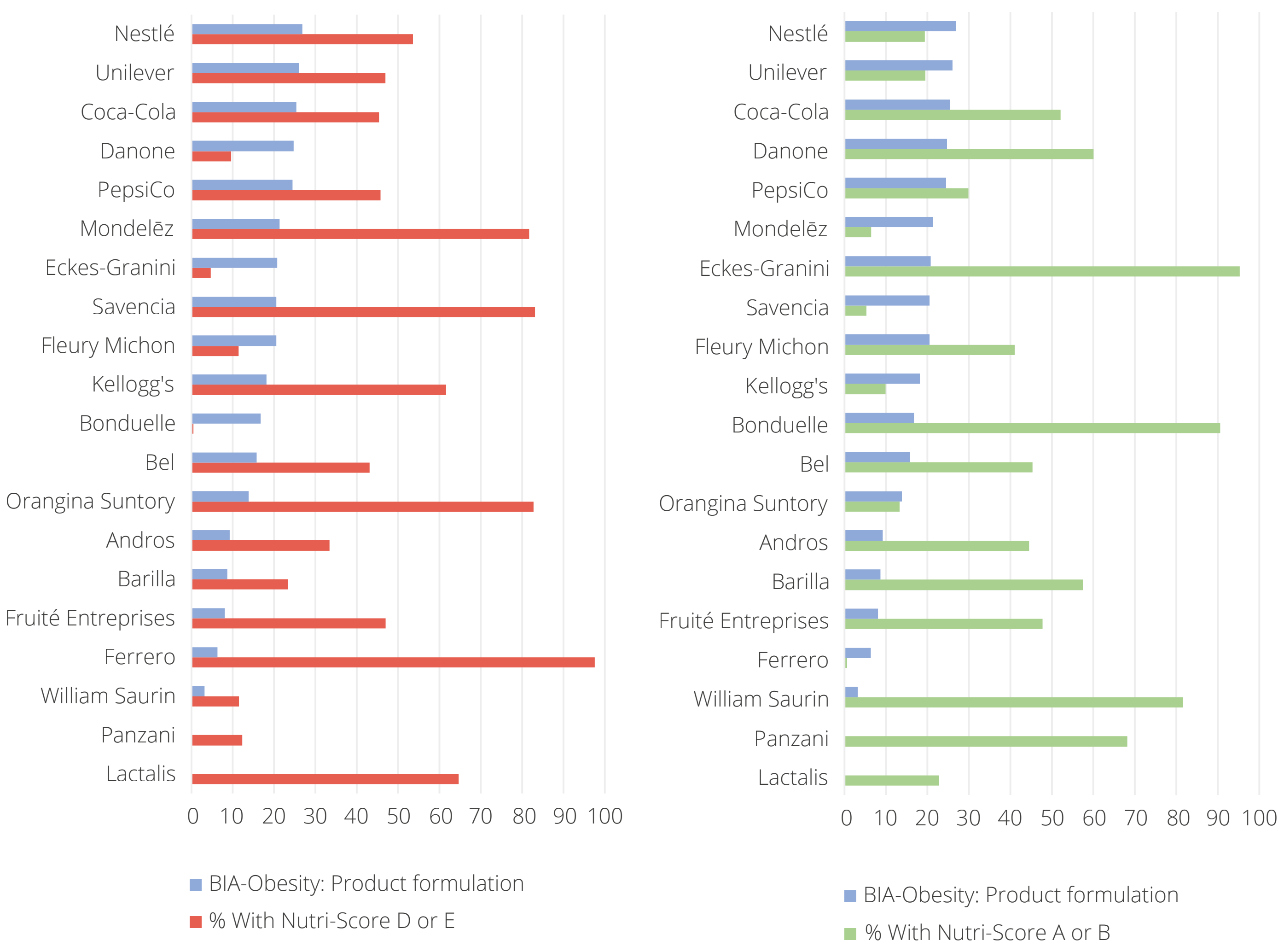


The percentage of products not-permitted to be marketed to children, ultra-processed and with Nutri-score D or E within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers (Source: Open Food Facts data France, 2018). *Data are sorted according to descending total BIA-Obesity scores (France, 2020).*

RESULTS

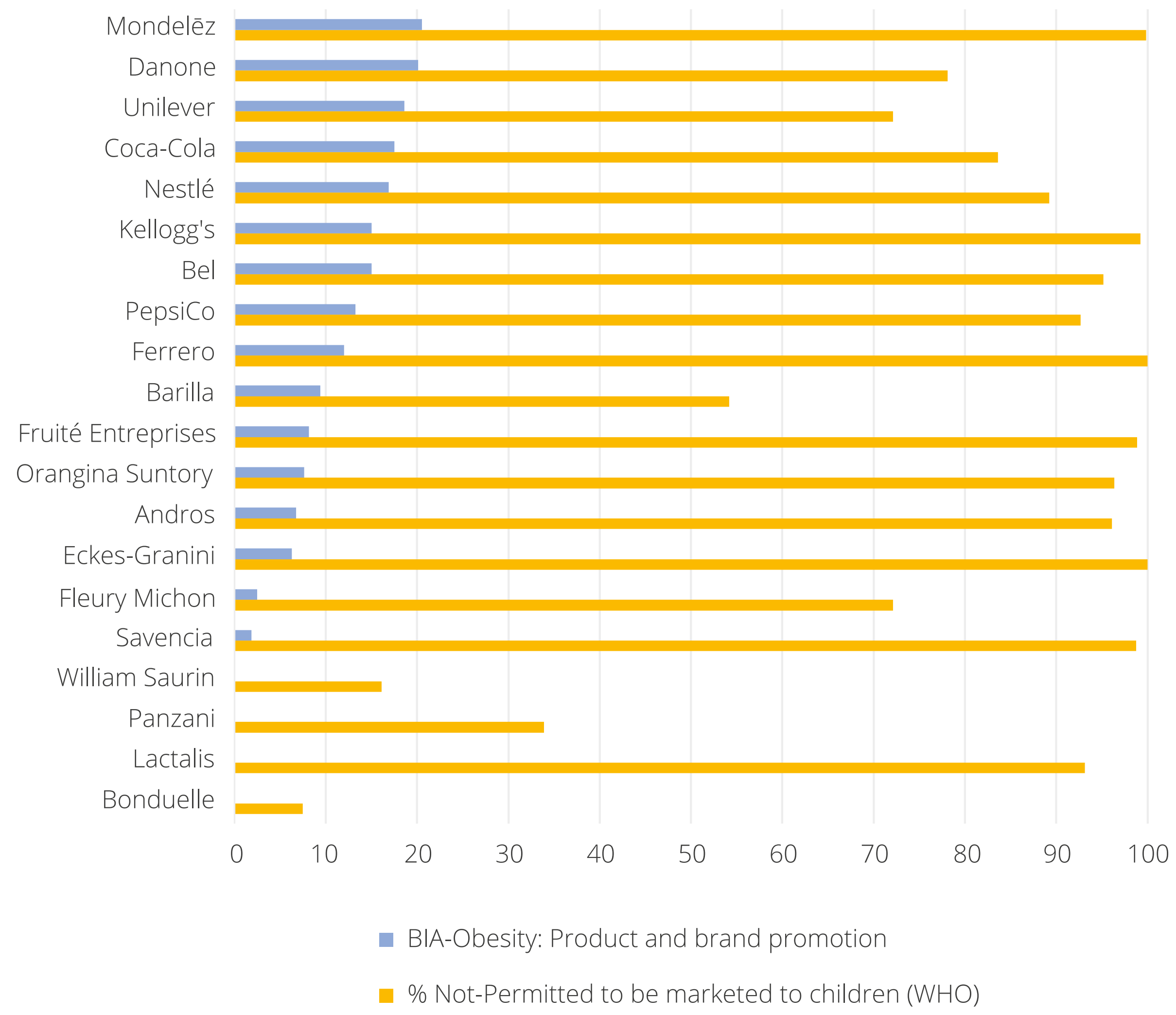
Commitments versus performance

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 (Source: Open Food Facts data France, 2018) 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 (France, 2020).

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 for 100% of food products not-permitted to be marketed to children. Among the companies that made no commitments to limit marketing to children (William Saurin, Panzani, Lactalis and Bonduelle) the percentage of products not-permitted to be marketed to children varied from 7.5% to 93%.



The percentage of products not-permitted to be marketed to children within the portfolios of the selected packaged food and beverage manufacturers (Source: Open Food Facts data France, 2018) 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 (France, 2020).

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.

RESULTS

The ranking of companies (1=best; 20=worst) according to the BIA-Obesity score (France, 2020), 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 (Source: Open Food Facts data France, 2018).
Data are sorted according to the descending overall BIA-Obesity scores (France, 2020).

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	7	4	7	14
Unilever	2	13	12	5	13
Coca-Cola	3	16-20	16	8	9
Nestlé	4	9	17	9	12
Mondelēz	5	16-20	19	18	16
PepsiCo	6	12	11	10	11
Fleury Michon	7	8	3	6	18
Kellogg's	8	11	10	17	19
Bel	9	4	5	12	3
Eckes-Granini	10	16-20	8	19-20	1
Bonduelle	11	1	1	1	4
Savencia	12	14	15	15	6
Orangina Suntory	13	16-20	18	14	15
Ferrero	14	16-20	20	19-20	20
Barilla	15	2	7	4	7
Andros	16	6	14	13	5
Fruité Entreprises	17	15	9	16	10
Panzani	18	3	2	3	8
William Saurin	19	5	6	2	17
Lactalis	20	10	13	11	2

Areas of strength across the sector

French 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

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 entire 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 unhealthy food products (according World Health Organisation Regional Office for Europe nutrient profile) across media and settings*

Product accessibility

1. *Support evidence-informed fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive taking into account the growing scientific evidence base*
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 French website*

Commitments

The median overall BIA-Obesity score for quick service restaurants (11%) was less than half of the median overall score for all companies (28%) (including packaged food and beverage manufacturers and supermarkets). The best performing company was McDonald's with an overall score of 39% while the worst performing company was Brioche Dorée with an overall score of 5%. The best performing domain for fast food companies was *'Nutrition labelling'* and the worst performing domains were *'Corporate population nutrition strategy'*, *'Product and brand promotion'* and *'Product accessibility'*. None of the quick service restaurants obtained a maximum score for any of the policy domains. Four of the six companies had no *'Corporate population nutrition strategy'*, two of the seven companies had no commitments on *'Product formulation'*, five had no commitments on *'Product and brand promotion'* and four 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. No companies fully engaged with the BIA-Obesity process.

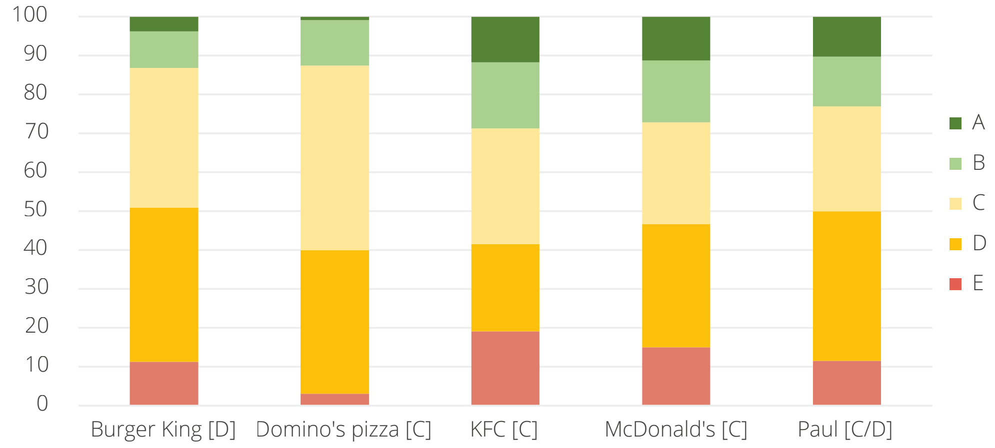
Scores of quick service restaurants by BIA-Obesity domain

	Weighting (%) in overall score	Median score (%)	Range of scores (%)
STRAT: Corporate population nutrition strategy	10	0	0-67
FORM: Product formulation	25	5	0-43
LABEL: Nutrition labelling	15	36	14-73
PROMO: Product and brand promotion	25	0	0-31
ACCESS: Product accessibility	20	0	0-14
RELAT: Relationships with other organizations	5	13	0-38
OVERALL BIA-Obesity score	**100**	**11**	**5-39**

Performance[1]

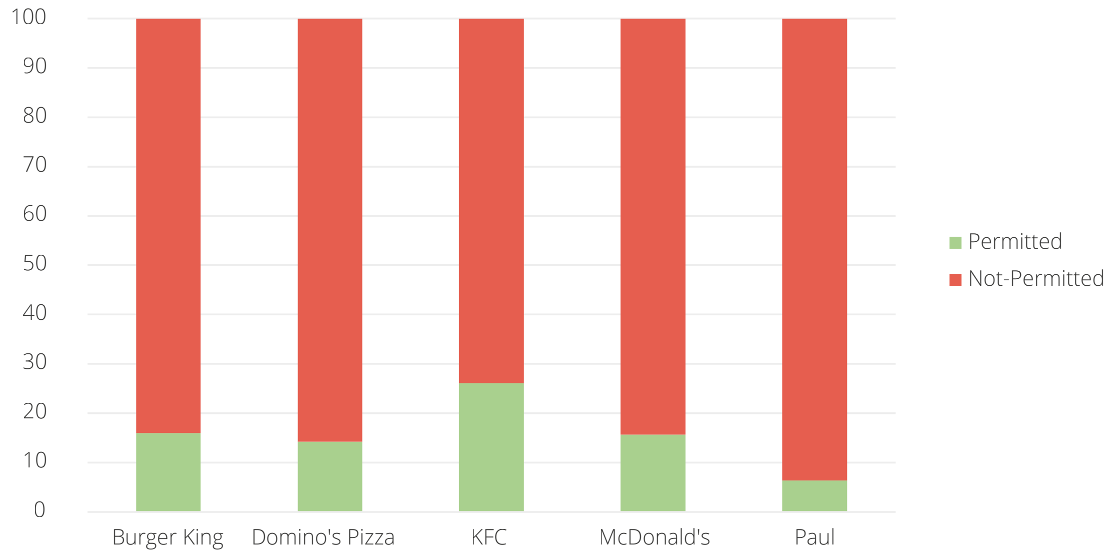
The quick service restaurant with the highest proportion of Nutri-Score A and B products was KFC (29%), closely followed by McDonald's (27%). The quick service restaurants with the highest proportion of Nutri-Score D and E products were Burger King (51%) and Paul (50%). Three out of the five quick service restaurants for which the product portfolios could be analysed had a median Nutri-Score C, one a median Nutri-Score C/D and one a median Nutri-Score D.

1. Excluding Brioche Dorée and Quick, as no nutritional information was available for these quick service restaurants



The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score [] within portfolios of selected quick service restaurants (Source: National company websites France, 2019).

For all five quick service restaurants, less than 30% of their product portfolio was permitted to be marketed to children according to the WHO-model. The product portfolio of Paul only contained 6% products that were permitted to be marketed to children. This went up to 26% for KFC.

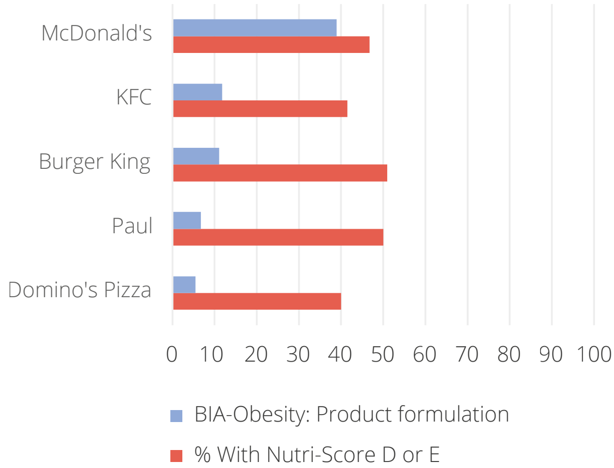


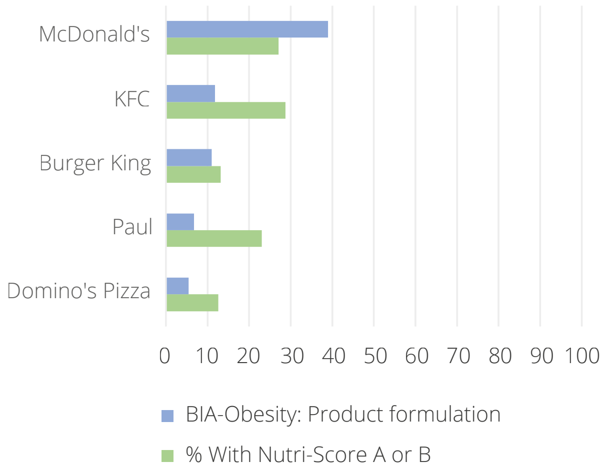
The proportion of products permitted and not-permitted to be marketed to children according to the WHO-model within portfolios of selected quick service restaurants (Source: National company websites France, 2019).

RESULTS

Commitments versus performance

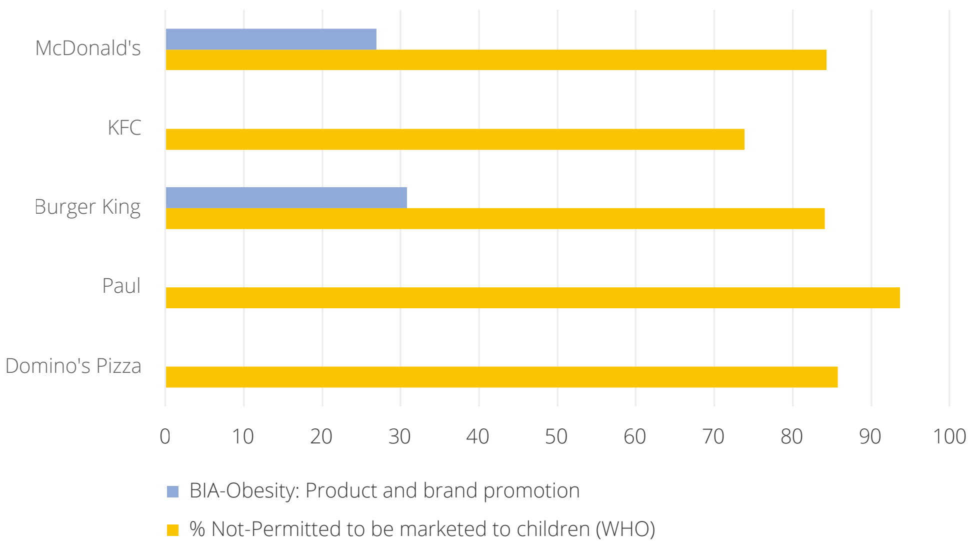
The performance metrics were compared with the commitments made within the corresponding BIA-Obesity domains. Company commitments made within the BIA-Obesity domain *'Product formulation'* were compared with the percentage of A and B Nutri-Score as well as D and E Nutri-Score products across the portfolio. 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 (Source: National company websites France, 2019) 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 (France, 2020).*

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 quick service restaurants for which data were available, only Burger King and McDonald's made commitments to limit marketing towards children.



The percentage of products not-permitted to be marketed to children within portfolios of selected quick service restaurants (Source: National company websites France, 2019) 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 (France, 2020).

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 performance metrics.

The ranking (1=best; 5=worst) of quick service restaurants according to the BIA-Obesity score (France, 2020), the proportion of products with Nutri-Score A and Nutri-Score E and the percentage of products permitted to be marketed to children (Source: National company websites France, 2019).
Data are sorted according to the descending overall BIA-Obesity scores (France, 2020).

Company	Rank of the company			
	BIA-Obesity Score	% Nutri-Score A products	% Nutri-Score E products	% products permitted to be marketed to children (WHO)
McDonald's	1	2	4	3
KFC	2	1	5	1
Burger King	3	4	2	2
Paul	4	3	3	5
Domino's Pizza	5	5	1	4

RESULTS

Areas of strength across the sector

French quick service restaurants were performing well in some areas and made some commitments in the following areas:

- 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 serving instead of per 100g

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 with strong appeal to children (e.g., cartoon characters, interactive games) on unhealthy food products (according World Health Organisation Regional Office for Europe nutrient profile) across 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 fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive taking into account the growing scientific evidence base*

Relationships with other organizations

1. *Publish all national relationships and funding for external research on the French website*

Findings by sector **Supermarkets**

Commitments

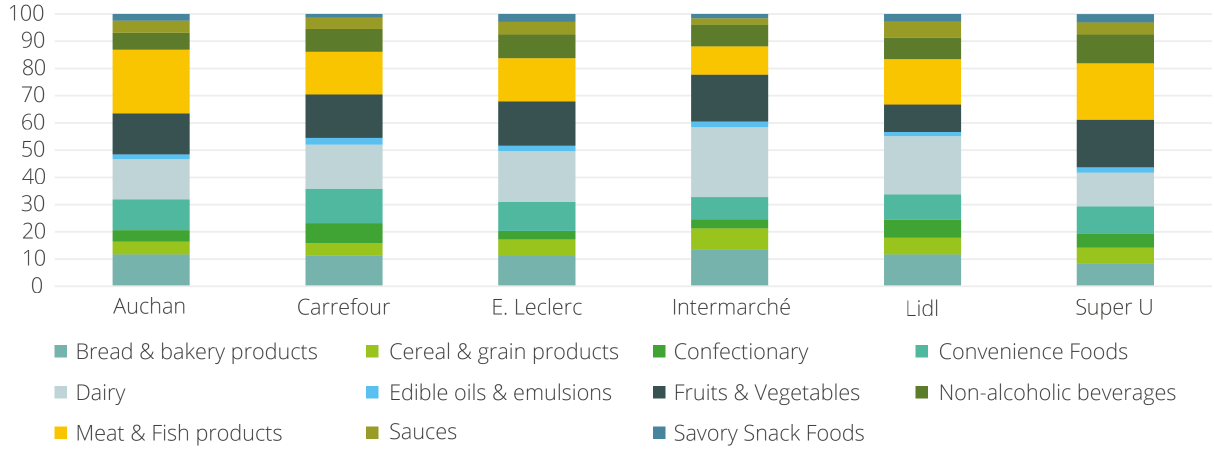
The scores for supermarkets are a hybrid assessment for their role as a retailer, as well as a packaged food and non-alcoholic manufacturer. The median overall score for the commitments of supermarkets (12%) was less than half of the median overall score for all companies (28%) (including quick service restaurants, food and non-alcoholic beverage manufacturers). The best performing domain for supermarkets was *'Corporate population nutrition strategy'*. The worst performing domains were *'Product and brand promotion'* and *'Product accessibility'*. None of the supermarkets obtained a maximum score for any of the policy domains. One company did not have a *'Corporate population nutrition strategy'*, six did not have any commitments for the domain *'Product and brand promotion'* and four did not have any commitments on *'Product accessibility'*. None of the 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	33	0-62
FORM: Product formulation	15	9	3-29
LABEL: Nutrition labelling	25	30	10-48
PROMO: Product and brand promotion	20	0	0-0
ACCESS: Product accessibility	5	0	0-6
RELAT: Relationships with other organizations	25	25	0-44
OVERALL BIA-Obesity score	**100**	**12**	**7-16**

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 (Source: Open Food Facts data France, 2018).

RESULTS

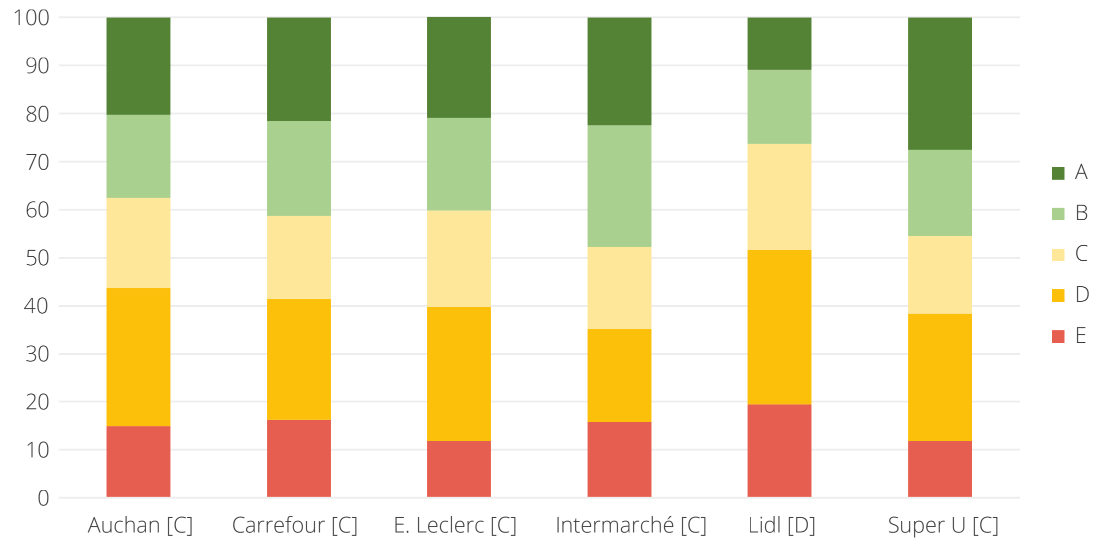
Overall the average energy-, sugar-, saturated fat- and salt content per food category was rather similar across the selected supermarkets within food categories. Nevertheless, the table below gives an overview of the best and worst performing supermarket per product category and per nutrient of concern.

The best (top) and worst (bottom) performing supermarkets per product category and per nutrient of concern (Source: Open Food Facts data France, 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	Auchan: 1554 [505]	Auchan: 19 [15]	Super U: 6 [6]	Intermarché: 0.8 [0.5]
	Least healthy	Intermarché: 1777 [389]	Lidl: 26 [15]	Lidl: 9 [7]	E. Leclerc: 0.9 [0.5]
Cereal & grain products [1]	Healthiest	1449 [303]	Intermarché: 2 [2]	Intermarché: 0.4 [0.6]	Intermarché: 0.1 [0.3]
	Least healthy	Carrefour: 1568 [265]	Carrefour: 12 [12]	Lidl: 2 [3]	Carrefour: 0.6 [0.8]
Confectionary	Healthiest	Super U: 1752 [475]	Lidl: 49 [19]	Super U: 8 [10]	Intermarché: 0.1 [0.1]
	Least healthy	Carrefour: 2040 [407]	Intermarché: 55 [22]	Carrefour: 15 [10]	Lidl: 0.3 [2]
Convenience Foods	Healthiest	Intermarché: 485 [336]	Intermarché: 2 [1]	Intermarché: 2 [1]	Intermarché: 0.9 [0.4]
	Least healthy	Lidl: 755 [336]	Lidl: 3 [2]	Auchan: 3 [3]	Lidl: 1 [1]
Dairy	Healthiest	Intermarché: 636 [442]	Auchan: 7 [8]	Intermarché: 6 [8]	Carrefour: 0.4 [0.6]
	Least healthy	Super U: 942 [528]	Carrefour: 12 [11]	Auchan: 11 [9]	Lidl: 0.8 [3]
Fruits & Vegetable products [2]	Healthiest	Carrefour: 460 [603]	Carrefour: 8 [12]	Carrefour: 1 [4]	Intermarché: 0.5 [0.6]
	Least healthy	Lidl: 1042 [911]	Lidl: 15 [19]	Lidl: 2 [5]	Lidl:2 [8]
Meat & Fish products	Healthiest	Super U: 775 [370]	Super U: 0.7 [2]	Super U: 4 [4]	Super U: 1 [1]
	Least healthy	Intermarché: 1049 [412]	Lidl: 1 [3]	Intermarché: 6 [6]	Intermarché: 2 [2]
Non-alcoholic beverages	Healthiest	Lidl: 246 [415]	Lidl: 11 [17]	Intermarché: 0.2 [0.6]	Several companies: 0
	Least healthy	Intermarché: 447 [495]	Intermarché: 22 [26]	Lidl: 0.5 [2]	Auchan: 0.1 [0.3]
Sauces	Healthiest	Intermarché: 802 [523]	Intermarché: 5 [6]	Auchan: 2 [3]	Intermarché: 1 [0.8]
	Least healthy	Super U: 1126 [822]	Carrefour: 15 [19]	Lidl: 3 [4]	Carrefour: 6 [15]
Savoury Snack Foods	Healthiest	Carrefour: 1850 [370]	Intermarché: 2 [1]	E. Leclerc: 4 [3]	E. Leclerc: 2 [0.7]
	Least healthy	Intermarché: 2188 [260]	E. Leclerc: 7 [13]	Intermarché: 11 [13]	Intermarché: 2 [0.7]

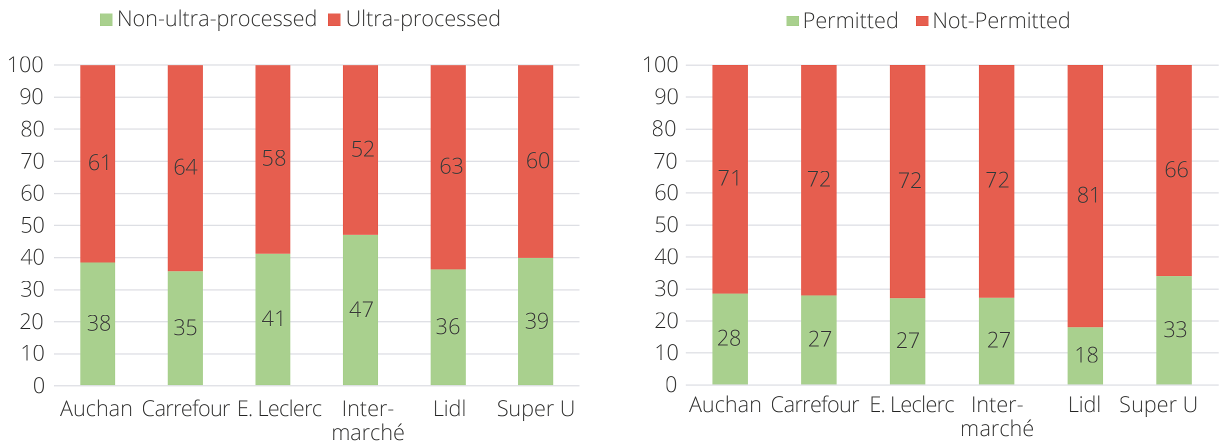
1. Including 'baking soda', belonging to the category 'Cereal & grain products' within the FoodSwitch categorization.
2. Including 'seasonings', belonging to the category 'Fruits & Vegetable products within the FoodSwitch categorization.

The supermarket with the highest proportion of Nutri-Score A products was Super U (27.5%), while the company with the highest proportion of Nutri-Score E products was Lidl (19.5%). Auchan, Carrefour, E. Leclerc, Intermarché and Super U had a median Nutri-Score of C while Lidl had a median Nutri-score of D.



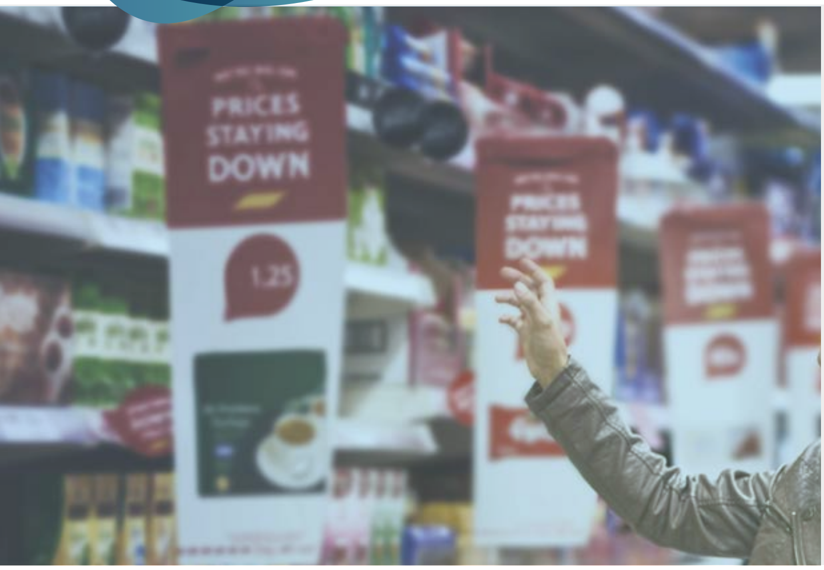
The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score [] within the portfolios of the selected supermarkets (Source: Open Food Facts data France, 2018).

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 Intermarché had the highest proportion of non-ultra-processed products (47.1%). Super U in turn had the highest proportion of products permitted to be marketed to children (34%). Carrefour had the highest proportion of ultra-processed products (64.3%) and Lidl the highest proportion of products not-permitted to be marketed to children (81.9%).



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 (Source: Open Food Facts data France, 2018).

RESULTS



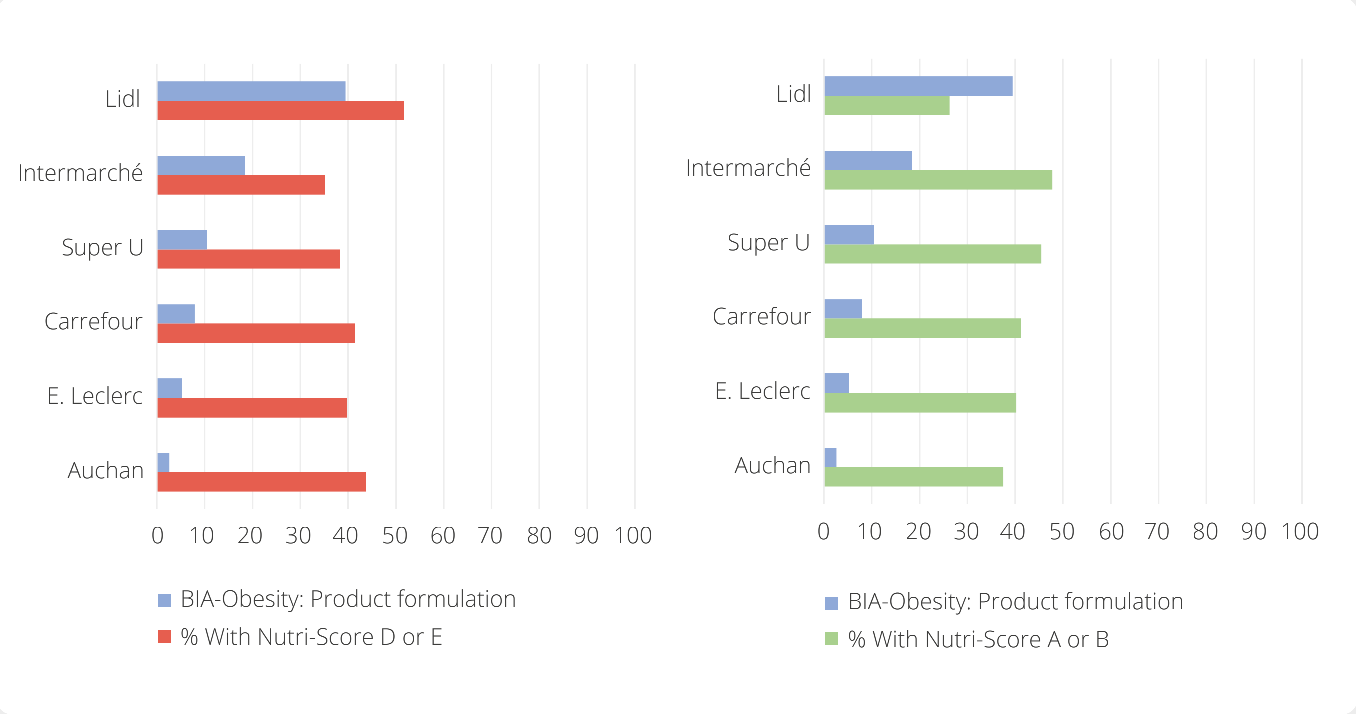
For the food promotions in the supermarket flyers, it was found that promotions were mostly for ultra-processed foods (47.6% up to 60.8% of all promotions). Considerable variation was observed between the different supermarkets. Across the entire circular, Carrefour Market most frequently promoted fresh fruits and vegetables and Auchan least of all. 28.7% (Lidl) up to 72.7% (Auchan) of the products in the supermarket flyers were discounted.

Healthiness and power of food promotions in supermarket flyers (France, October 2019 – March 2020).

	Auchan	Auchan Supermarché	Carrefour Market	Carrefour Hypermarché	E.Leclerc	Intermarché	Lidl	Super U
Number of products present in 6 months flyers	2481	818	1300	3036	2028	1860	1510	969
% with Promotional characters	2.6	/	7.9	7.1	8.6	9.1	/	0.2
% Discounted	72.7	64.0	72.5	68.0	66.8	69.2	28.7	37.8
% with Incentive offers	0.2	/	1.6	0.1	3.9	8.4	/	/
% fresh fruit and vegetable promotions	3.2	4.0	7.0	4.7	4.9	5.2	5.3	5.7
% promotions for ultra-processed foods	52.7	53.3	49.3	47.6	52.1	53.9	60.8	49.4

Commitments versus performance

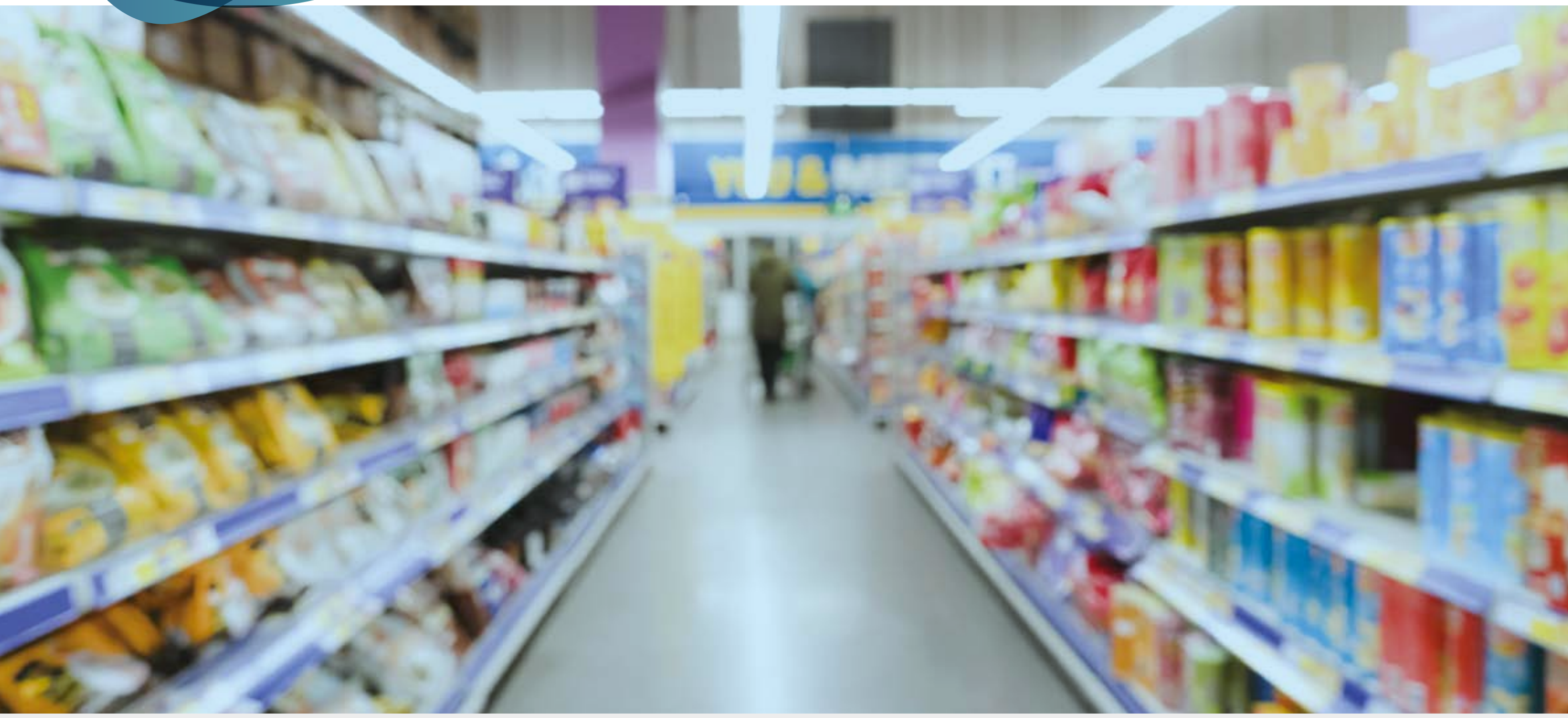
The performance metrics were compared with the commitments made within the corresponding BIA-Obesity domains. Company commitments made within the BIA-Obesity domain *'Product formulation'* were compared with the percentage of A and B Nutri-Score as well as D and E Nutri-Score products within company portfolios. 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 packaged food and beverage manufacturers (Source: Open Food Facts data France, 2018) 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 (France, 2020).

Supermarkets' 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 no supermarket made commitments to limit marketing towards children.

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, 6=worst) of supermarkets according to the BIA-Obesity score (France, 2020), 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 (Source: Open Food Facts data France, 2018) and the amount of fresh fruits and vegetables as well as non-ultra-processed products promoted within supermarket flyers (Flyers France, October 2019 – March 2020).
Data are sorted according to the descending BIA-Obesity scores within this domain (France, 2020).

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)	% of products that are not ultra-processed (NOVA)	Promotions fresh fruits and vegetables	Promotions non-ultra-processed food products (NOVA)
Lidl	1	6	6	6	5	3	6
Intermarché	2	2	4	4	1	4	5
E. Leclerc	3	4	2	5	2	5	3
Carrefour	4	3	5	3	6	1*	1
Auchan	5	5	3	2	4	6	4
Super U	6	1	1	1	3	2	2

* While Carrefour Market promoted the most fresh fruits and vegetables, this wasn't the case for Carrefour Hypermarché (see table above on supermarket flyers).

Areas of strength across the sector

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

- Some commitment to improving population nutrition on the national website
- Clear commitment to reformulate private label grocery products with respect to saturated fat, sugar, sodium for some retailers
- Commitment to display the Nutri-Score on all private label grocery products, including online for most 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 the regular catalogues*

Product accessibility

1. *Support evidence-informed fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive taking into account the growing scientific evidence base*
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 French website*

A. Corporate population nutrition strategy

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

53/100

Key findings

This is the best performing domain of the BIA-Obesity

7 out of the 33 companies did not have any corporate population nutrition strategy, and none of the companies achieved the maximum score for this BIA-Obesity domain.

8 out of 33 companies, mostly packaged food and beverage companies, had regular, publicly available national reports including reporting against objectives and targets.

Packaged food and beverage companies (median score 63%) performed better than supermarkets (median score 33%) and quick service restaurants (median score 0%) for this domain.

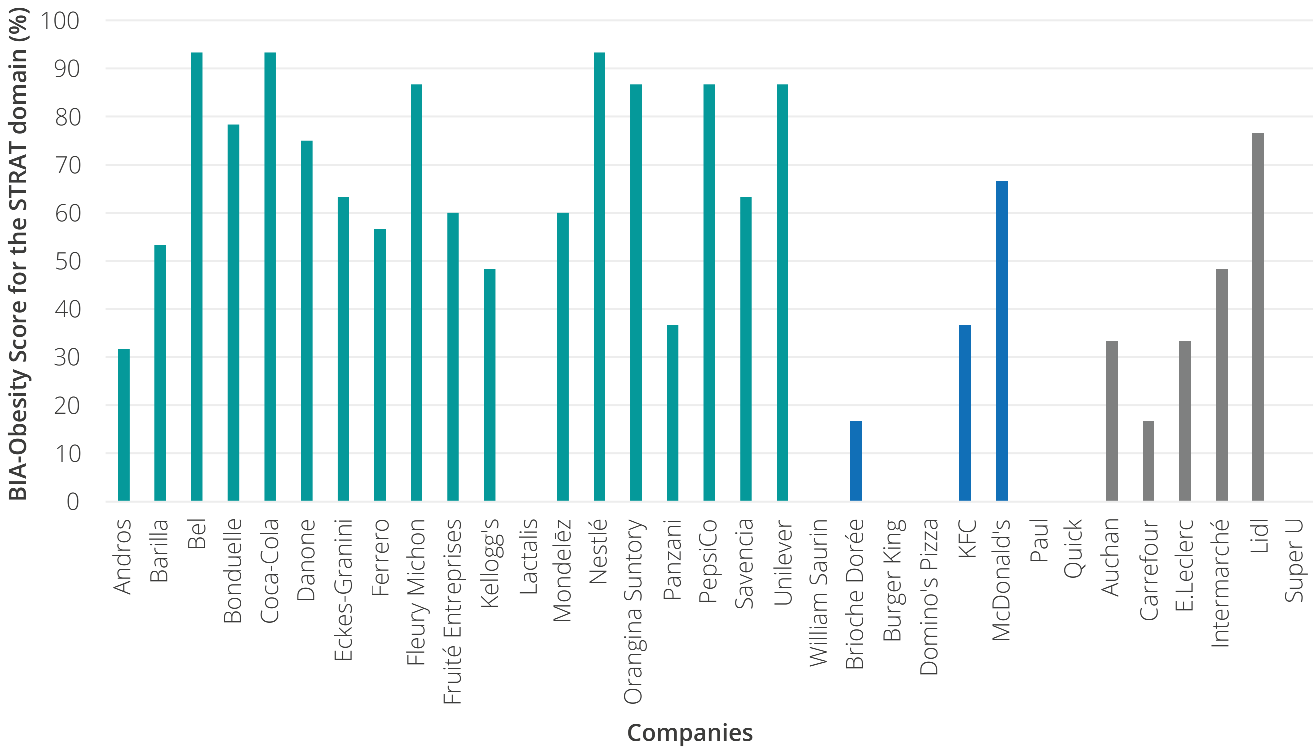
Some companies recognized both national (i.e. Nutri-Score) as well as international (i.e. The United Nations Sustainable Development Goals or the World Health Organization global NCD action plan) priorities within their corporate nutrition strategy.

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

29/100

Key findings

Four out of 33 companies had no commitments in this domain

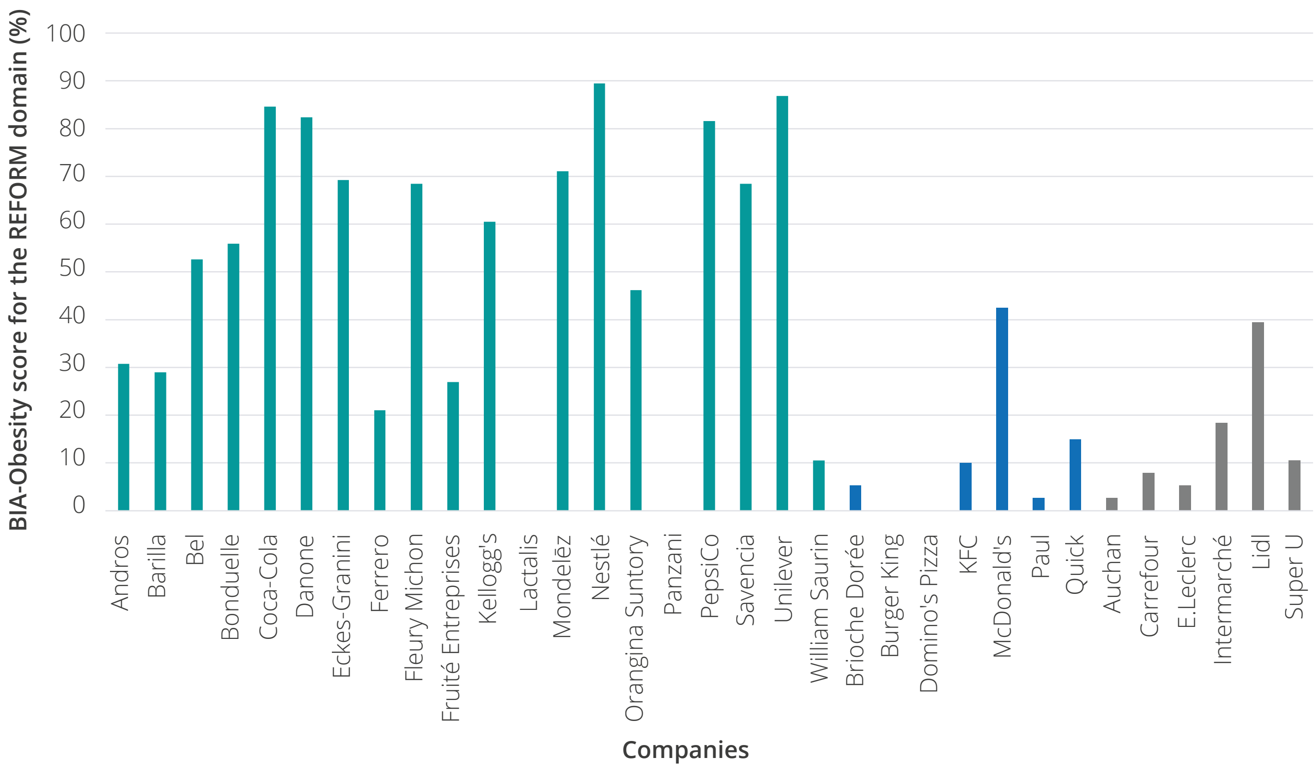
No company obtained the maximum score for this domain while four companies (Lactalis, Panzani SAS, Burger King, Domino's Pizza) did not have any commitments on product formulation.

The best performing company, Nestlé, publicly supported the EU ambition on reformulation and a robust EU Nutrition Policy.

3 out of 20 food and non-alcoholic beverage manufacturers, but no supermarkets, already utilized Nutri-Score to guide their reformulation efforts..

11 out of 20 food and non-alcoholic beverage manufacturers and two supermarkets had targets in relation to reducing sodium content, while 14 out of 20 food and non-alcoholic beverage manufacturers and two supermarkets had targets in relation to reducing added sugar content.

8 out of 20 food and non-alcoholic beverage manufacturers and 1 out of 5 supermarkets had targets in relation to reducing portion sizes where relevant, while only 1 out of 7 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 entire 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

33/100

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. This is the second best BIA-Obesity domain

No companies obtained the maximum score for this domain while one company (Fruité Entreprises) did not have any commitments for nutrition labelling.

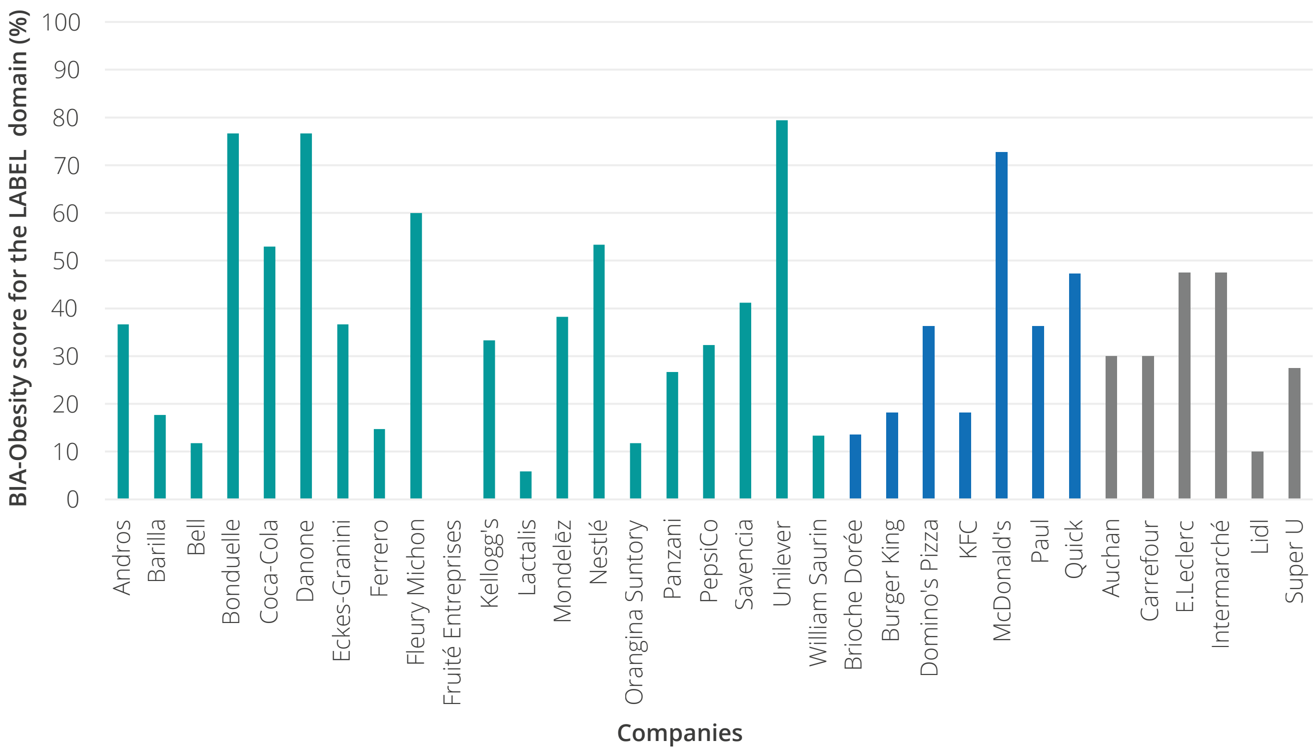
Packaged food and non-alcoholic beverage companies (median score 35%) and quick service restaurants (median score 36%) performed better within this domain compared to supermarkets (median score 30%).

The top performer in this domain (Unilever) committed to link the use of nutrition and health claims with the nutrient profile of products applying the Unilever Nutrition Criteria.

12 out of 20 packaged food and non-alcoholic beverage manufacturers and all six supermarkets committed to implement the government-endorsed Nutri-Score System on their (own-brand) products.

All quick service restaurants provided nutritional information about food and meals online to some extent, although sometimes only per serve (without indication of portion size) instead of per 100g, and four out of seven committed to labelling their menu boards in-store.

Three companies have a commitment not to display health and nutrition claims on products that are unhealthy. For one of those companies the commitment is public (Unilever), while for the other two the commitment has not been published.



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)

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

8/100

Key findings

This is the second worst scoring BIA-Obesity domain in France

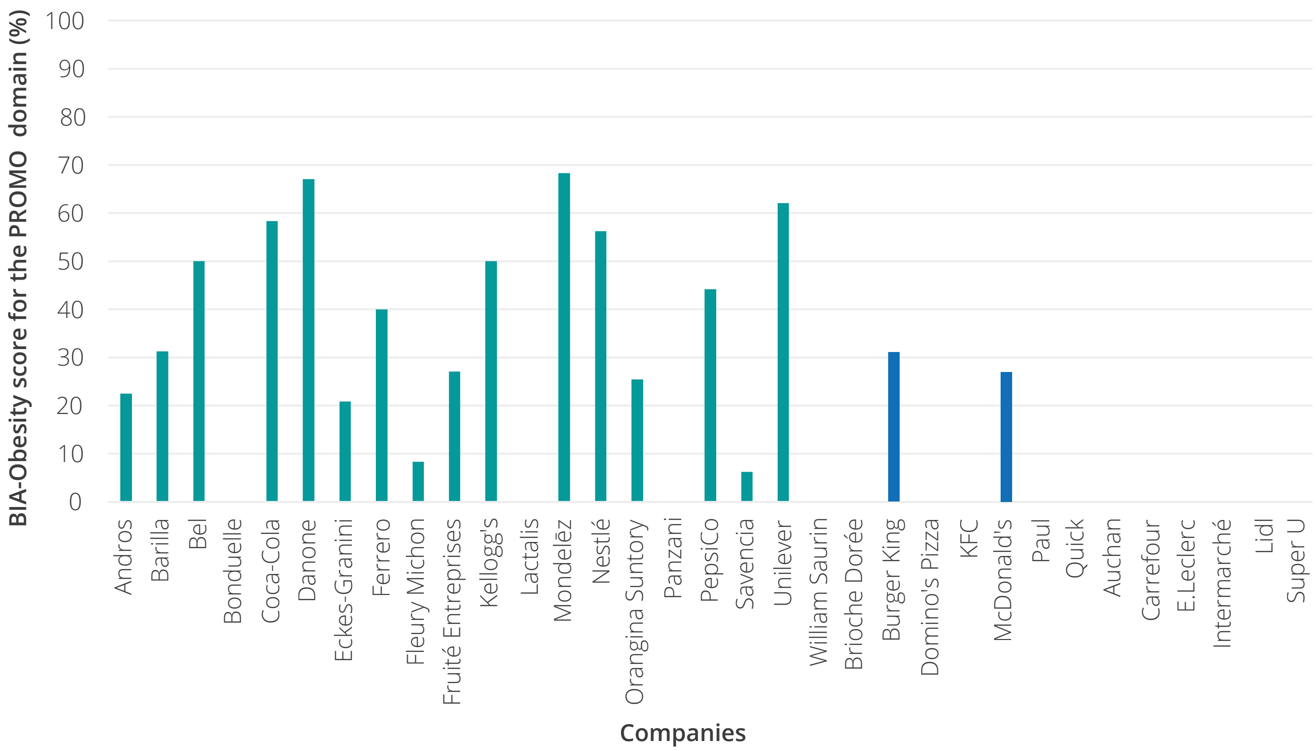
15 out of 33 companies had no commitments in this domain, of which all supermarkets and five out of 7 quick service restaurants.

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.

3 out of 20 packaged food and beverage manufacturers, but no supermarkets or quick service restaurants, committed not to sponsor children's sporting, cultural or other activities using unhealthy foods and brands.

No companies explicitly opposed neither supported government restrictions on unhealthy food marketing to children.



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.

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

6/100

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.

12 out of 33 companies did not have any commitments in this domain.

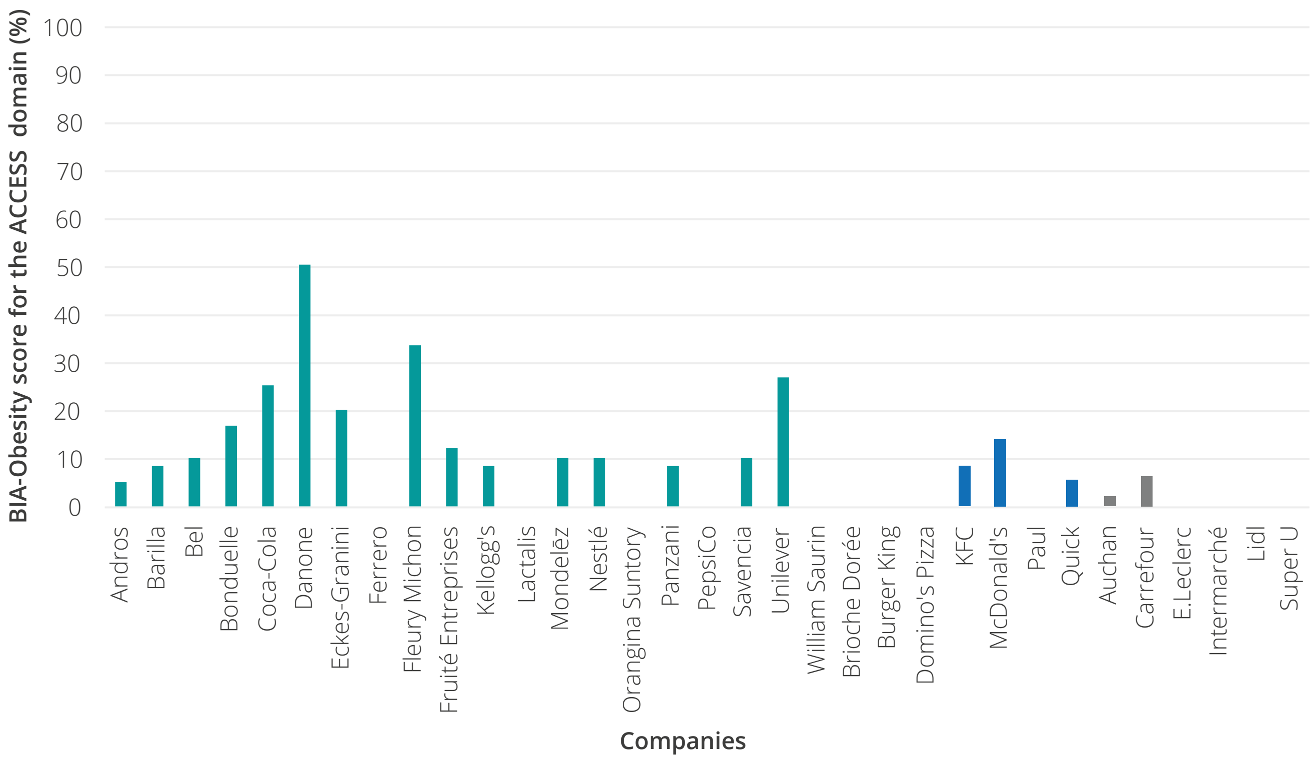
Product accessibility was the worst performing BIA-Obesity domain, with few clear commitments to address the accessibility of healthy compared to 'less healthy' products.

While the weight of this domain is higher for supermarkets and quick service restaurants, they did not implement any best practice actions in this domain.

Seven packaged food or beverage companies opposed while three companies supported the implementation of taxes on certain unhealthy food products. Supermarkets neither opposed or supported the implementation of such taxes.

Findings by domain

E. Product accessibility



Key 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 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

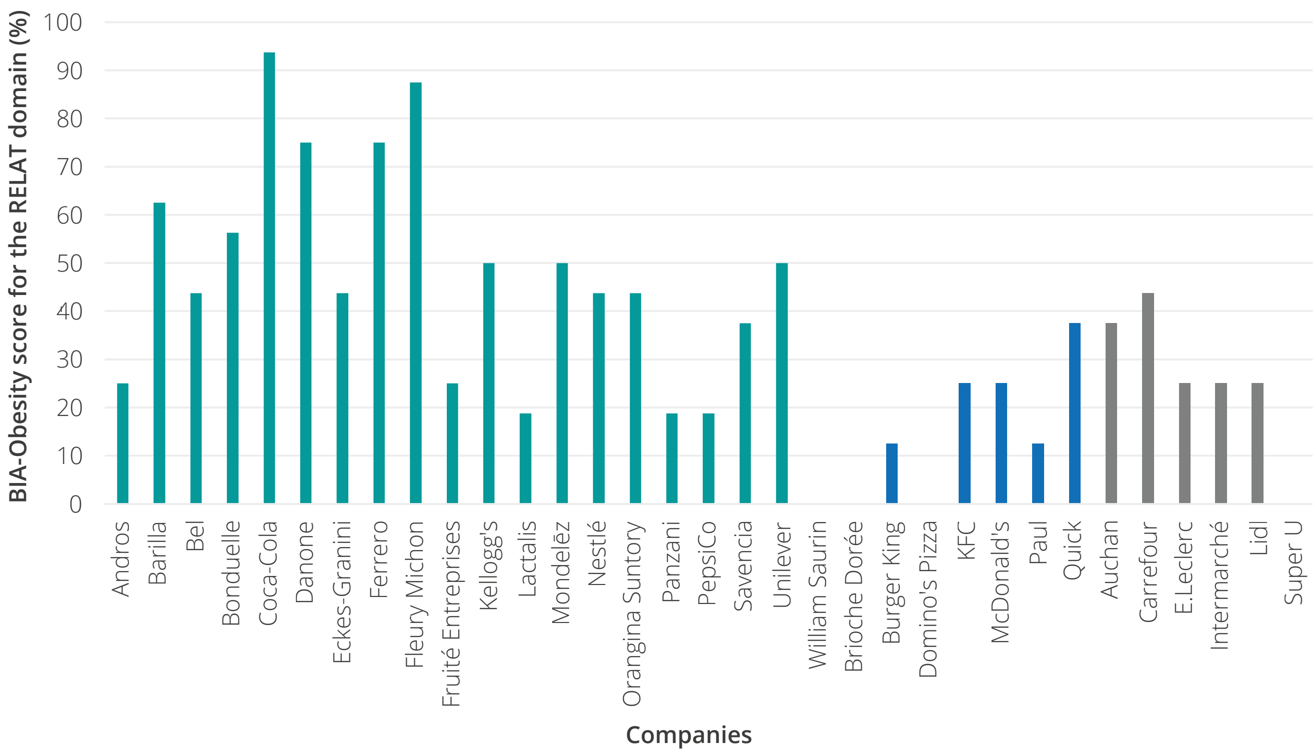
38/100

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, including support for research, nutrition education programs and active lifestyle programs on their national website.

4 companies did not have any commitments for this domain.



Key recommendations for action

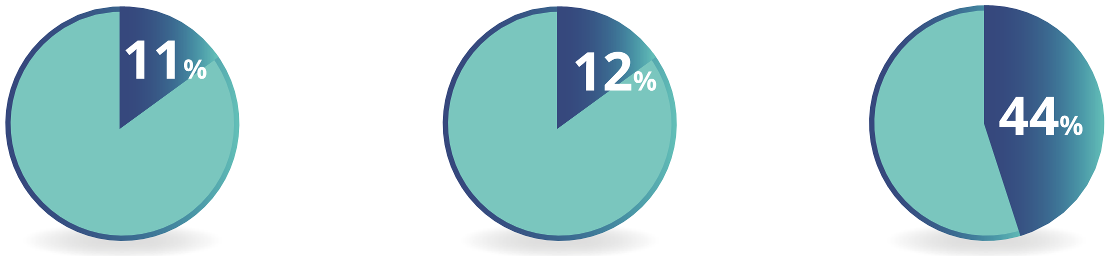
Disclose relationships (including funding and support) with external groups (e.g., professional organisations, research organisations, community and industry groups) related to health and nutrition.

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 France. The findings show that there is a large variation in the overall scores for the transparency, comprehensiveness and specificity of commitments, and that less than half of the companies selected engaged with the BIA-Obesity tool and process. The best performing domain was *'Corporate population nutrition strategy'* while the worst performing domain was *'Product accessibility'*. The overall scores ranged from 2% to 74%, with a median overall score of 28%.

The median overall score was

for quick service restaurants | **for supermarkets** | **for packaged food and non-alcoholic beverage manufacturers**



In general, performance metrics relating 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 France. The main aim is for this assessment to be repeated over time so that the 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 and the research they fund. Food companies across sectors are encouraged to seriously improve commitments and practices in the domains of *'Product and brand promotion'* 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 median score of companies who fully engaged was significantly higher than the median 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 <u>commitments</u> and <u>transparency</u> and to a limited extent <u>performance</u>, 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 France, 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 French food companies have taken a few 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 France 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.

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 France.

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