

COMPANIES' COMMITMENTS AND PRACTICES ON POPULATION NUTRITION (BIA-OBESITY) AND ENVIRONMENTAL SUSTAINABILITY (BIA- SUSTAINABILITY)

A DETAILED ASSESSMENT

Belgium

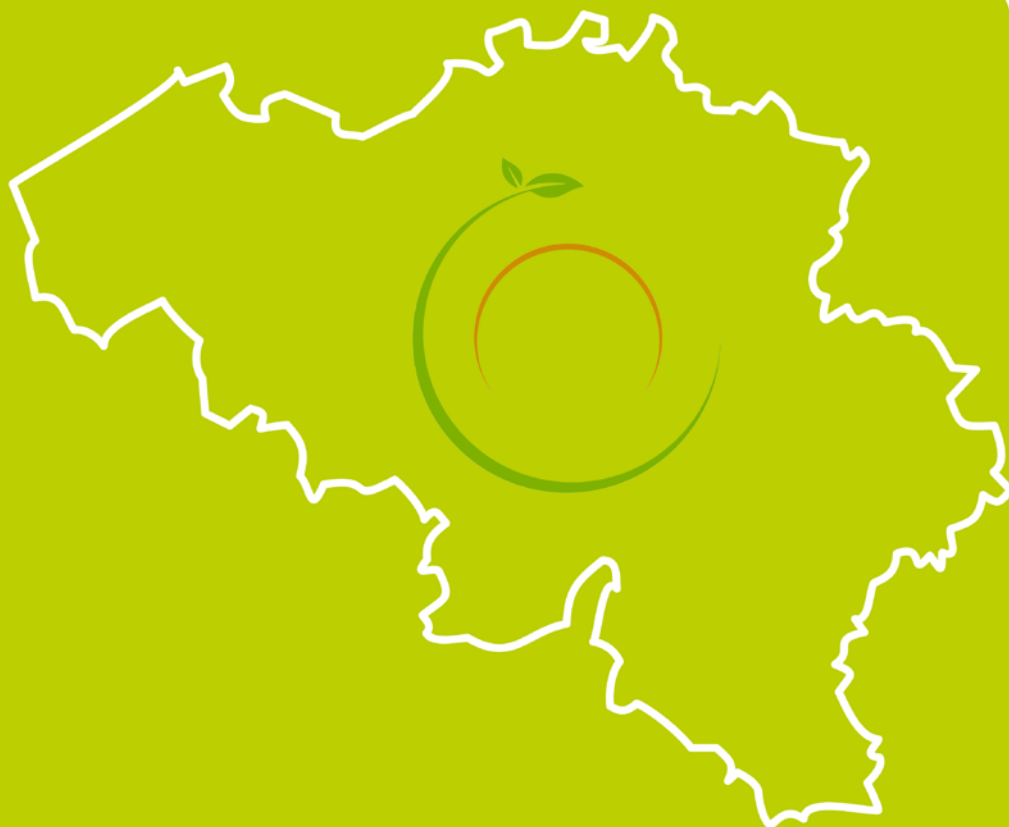
2023/2024

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OVERVIEW

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

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

In Belgium about 20% of total greenhouse gas emissions are due to the food system¹(including 10% due to agricultural production).

Actions from the government, the food industry and society all contribute to the healthiness and sustainability of food environments.

In Belgium

1 Out of **2**
adults are overweight or
obese²

1 In **7**
adolescents in Belgium are
overweight or obese²



¹ [HTTPS://WWW.NATURE.COM/ARTICLES/S43016-021-00225-9](https://www.nature.com/articles/s43016-021-00225-9)

² BELGIAN HEALTH INTERVIEW SURVEY 2018

PROJECT AIMS

This project aims to contribute to efforts to improve Belgian food environments for nutrition and environmental sustainability by assessing transparency, comprehensiveness and specificity of commitments. In addition, we assessed the practices related to obesity prevention and population nutrition, by the major Belgian food companies. Both the BIA-Obesity and the BIA-Sustainability were developed by the International Network for Food and Obesity/NCDs Research, Monitoring and Action Support (INFORMAS) for benchmarking food company policies and practices on population nutrition and sustainability at the national level.³

In Europe, the BIA-Obesity has previously (2019-2020) been implemented in Belgium and France across four sectors (packaged food and non-alcoholic beverage manufacturers, supermarkets and quick service restaurants) as part of the STOP Horizon2020 project.⁴ We built further on this work in 2023/2024 and applied the BIA-Obesity for the second time in Belgium. In addition we applied the BIA-Sustainability for the first time in Belgium.

Future perspective

The future perspective is for these BIA tools to be used for regular monitoring to increase accountability of industry actors to improve their commitments, as well as to support governments for stronger policies to improve food environments in Belgium.

³ WWW.INFORMAS.ORG

⁴ [HTTPS://PUBMED.NCBI.NLM.NIH.GOV/35392933/](https://pubmed.ncbi.nlm.nih.gov/35392933/)

PROCESS

We included a selection of packaged food and non-alcoholic drink manufacturers, supermarkets and quick service restaurants in the assessment.

Publicly available information on commitments was gathered and analysed for all 33 selected food companies in Belgium. Commitments were included up to end of February 2024 for BIA-Sustainability and end of August 2024 for BIA-Obesity. Commitments were gathered through a scanning of Belgian and European/international companies' 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. The latter was only possible for BIA-Obesity and not for BIA-Sustainability due to lack of data.

Companies were assessed and ranked, highlighting examples of best practice, key areas for improvement and recommendations. A scorecard was prepared for each company, comparing their scores with the best in sector and with their scores from 2019 (where applicable).

BIA-sustainability domains¹

Domains
Corporate sustainability strategy
Packaging
Emissions
Energy use
Water and discharge
Biodiversity
Food loss and waste
Environmental compliance
Reducing animal-based products
Sustainable products

1- The BIA-sustainability does not have any weightings

BIA-Obesity domains and weightings²

Domains	Packaged food & beverage manufacturers	Quick service restaurants	Supermarkets
Corporate population nutrition strategy	10%	10%	10%
Product formulation	25%	25%	30%
Nutrition labelling	15%	15%	20%
Product and brand promotion	25%	25%	30%
Product accessibility	20%	20%	5%
Relationships with other organizations	5%	5%	5%

2 - Weightings derived through literature review and international expert consultation

Company commitments on obesity and population nutrition in Belgium 2023/2024

The BIA-Obesity summary dashboard of overall scores for the transparency, comprehensiveness and specificity of food company commitments by sector and food company can be found below in Figure 1.

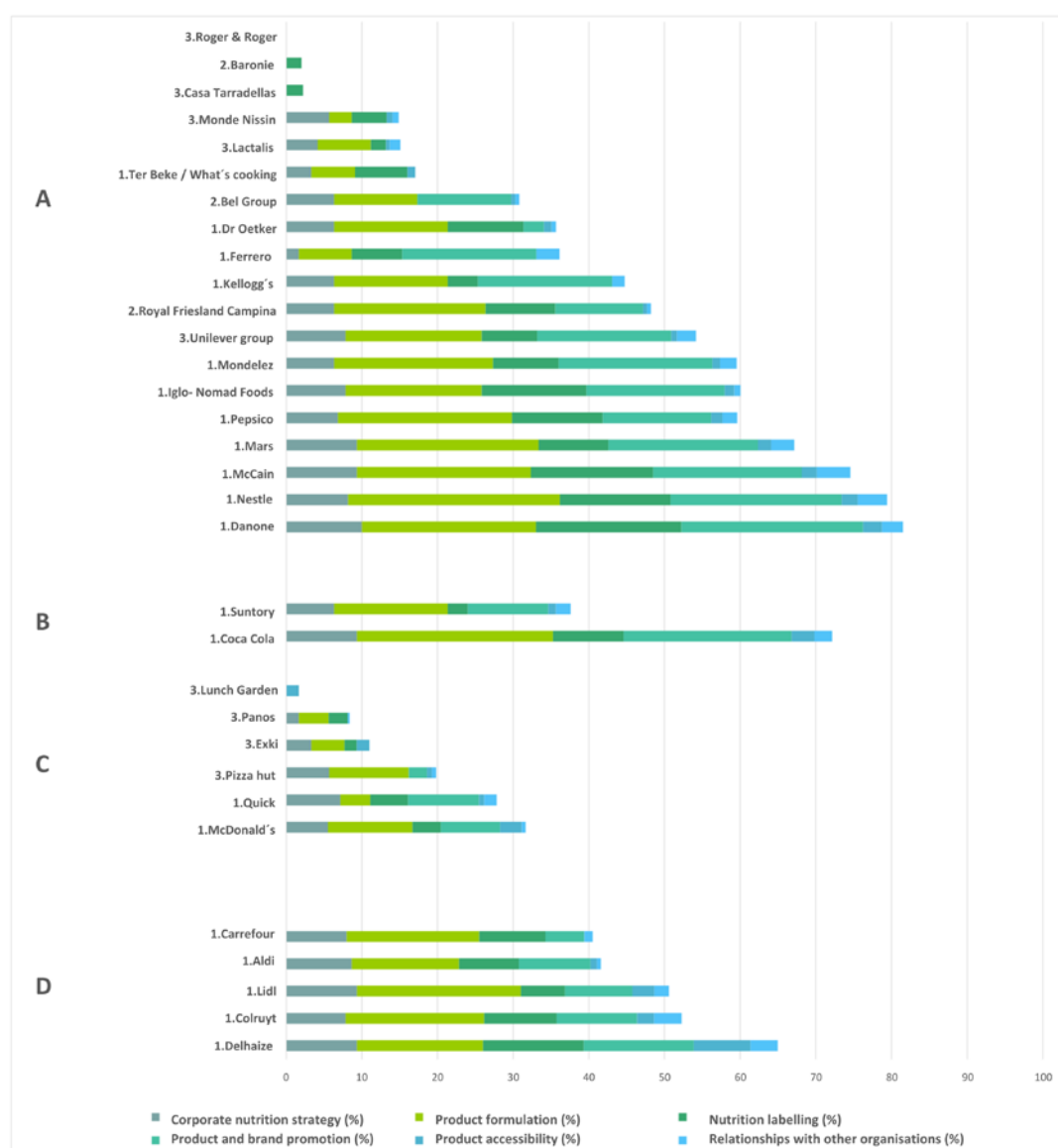


Figure 1. Business Impact assessment on Obesity and Population Nutrition (BIA-Obesity), Belgium 2023/2024

Overall and domain-specific scores for A: Packaged food, B: Non-alcoholic beverage manufacturers, C: Quick Service Restaurants, D: Supermarkets

Group 1: Full engagement with the process (N=20); Group 2: Accepted participation, but contributions not received in time (N=3); Group 3: Due to Lack of contact, the assessment of commitments was based on publicly available information only (N=9).

Belgian food companies have shown varying levels of commitment to improving population nutrition. While there is a notable effort in creating corporate nutrition strategies, significant gaps remain across policy domains, in particular for product accessibility. The overall scores for the BIA-Obesity assessment varied widely, ranging from 0% to 82%, with a median score of 40%. Among different sectors, quick service restaurants had a median score of 15%, supermarkets achieved a median of 51%, and packaged food and non-alcoholic beverage manufacturers had a median score of 45%. While the engagement of companies in the BIA-Obesity process led to a notable increase in overall median scores from 31% to 51% for those that fully participated, it is not possible to indicate similar changes for the BIA-Sustainability assessment. This is because, at present, we do not have the overall scores for BIA-Sustainability, which limits our ability to make a direct comparison of scores before and after their engagement in this process.

BIA-Obesity commitments versus performance for the different sectors in Belgium 2023/2024

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

Comparison of BIA-Obesity 2023/2024 with BIA-Obesity 2019

In comparing the BIA-Obesity results from 2023/2024 with those from 2019, we focused exclusively on the companies that were included in both assessments, excluding any companies that were not consistently evaluated across both years. In total 25 companies have been assessed in both years (2023/2024 and 2019), including all 5 supermarkets, 5 quick service restaurants, 2 non-alcoholic beverage manufacturers and 13 packaged food manufacturers. Figure 2. Shows the comparison of the overall results between 2019 and 2023/2024 for the 25 selected companies.

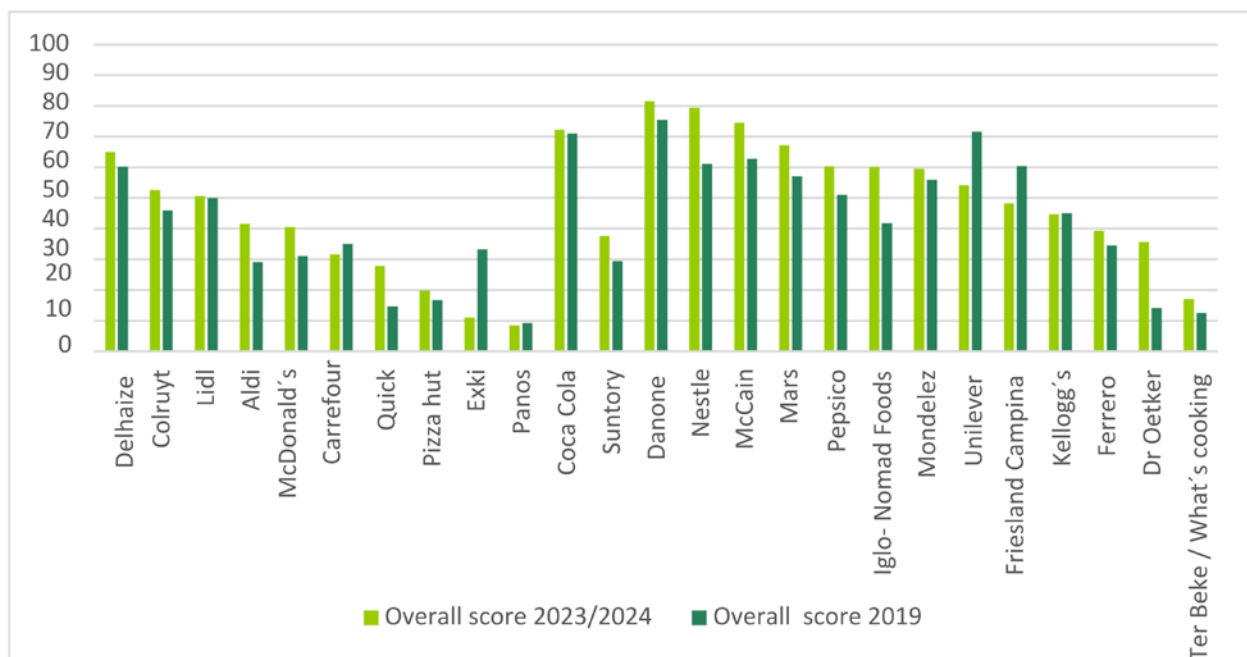


Figure 2. Comparison of the BIA-Obesity between 2019 and 2023/2024, overall results.

Company commitments on environmental sustainability in Belgium 2023

In the realm of environmental sustainability, scores demonstrated a broad commitment to various aspects such as reducing energy use, emissions, and packaging, with some companies achieving a score of up to 100% in certain domains. However, there are critical domains like environmental compliance, reducing animal-based products and increasing sustainable products (i.e. seasonal or local products) within company portfolio's where many companies scored low or showed no progress. The median scores reflect a moderate commitment to sustainability, with higher scores observed in areas such as corporate sustainability strategy (80%) and emissions reduction (87%). In contrast, moderate scores were noted for packaging (58%) and biodiversity (53%). However, lower median scores were reported for sustainable products and reducing animal-based products (both at 33%), as well as water use and discharge (19%) and environmental compliance (0%). These data highlights the need for a more consistent and comprehensive approach to sustainability across the industry (Figure 3). Overall, while the sustainability strategies and some specific efforts are commendable, these critical areas deserve more attention to ensure significant and consistent improvements across the food industry.

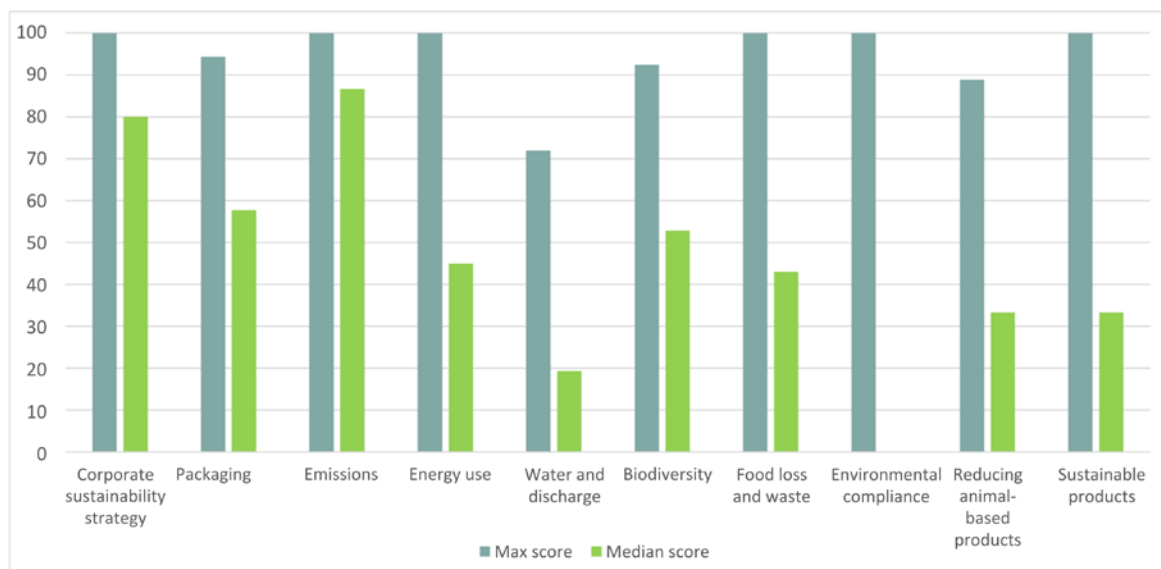


Figure 3. BIA-Sustainability, overall results for all the selected companies in Belgium 2023/2024, Median and maximum scores for the sustainability domains

Key recommendations for BIA-Obesity

General Recommendations Across Sectors:

- Companies should make clear commitments to improving population nutrition on their national websites and regularly report on these commitments.

Packaged Food, Non-alcoholic Beverage Manufacturers, and Supermarkets

- Continue reformulation efforts to reduce sodium, sugar, saturated fat, and energy across key product categories.
- Commit to implementing the Belgian Government-endorsed Nutri-Score on all packaged food and non-alcoholic beverages, and ensure its visibility online and on in-store shelves, especially for supermarkets.
- Consider measures to reduce the promotion of unhealthy foods, replacing them with healthier alternatives to encourage better purchasing decisions.

Quick Service Restaurants

- Ensure that nutritional information about foods and meals is readily available online.
- Display the energy content of foods and meals on in-store menus.

Corporate Population Nutrition Strategy

- Integrate population nutrition as a priority within corporate strategies, with SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) objectives and sufficient resources.
- Link senior management KPIs to the achievement of nutrition targets to ensure accountability.

Product Formulation

- Establish SMART targets for reducing sodium, sugar, saturated fat, and energy across the product portfolio, based on specific benchmarks by category.
- Use Nutri-Score to guide product development and reformulation initiatives.

Nutrition Labeling

- Advocate for the European-wide adoption of the Nutri-Score front-of-pack labelling system.
- Ensure that nutrition and health claims are made only on products that meet an independently verified nutrient profiling system.
- Quick service restaurants should disclose energy content on their menus.

Product and Brand Promotion

- Develop robust marketing policies that protect children up to 18 years from exposure to unhealthy product promotions.
- Use the World Health Organization's nutrient profile model to define products that should not be marketed to children.
- Eliminate marketing techniques that appeal to children, such as cartoon characters and games, for unhealthy products across all media platforms.

Product Accessibility

- Support government initiatives such as taxes on sugar-sweetened beverages to promote healthier food environments.
- Increase the proportion of healthier food products within the overall company portfolio.

Relationships with Other Organizations

- Transparently publish all relationships with external organizations and funding sources for research on company websites.
- Disclose all political donations in real time, or commit to a policy of not making political contributions.

There remains significant room for improvement, with many companies needing to transform commitments into concrete actions. Continuous monitoring and evaluation will be essential to ensure commitments lead to meaningful changes in food environments

Key recommendations for BIA-Sustainability

Corporate sustainability strategy

- Disclosing publicly available commitment on participating to UNGC or disclose alignment of commitments with SDGs.
- Disclosing measurable / time bound targets to screen the suppliers based on environmental criteria.

Packaging

- Disclosing time bound targets to reduce packaging to the company as well as the suppliers.
- Disclosing measurable / time bound targets to prioritize the use of renewable and recycled materials.

Emissions

- Disclosing time bound/ measurable targets for reducing GHG emissions within the company and suppliers.
- Participating in thematic benchmarking such as Carbon Disclosure Project (CDP climate).

Energy use

- Disclosing measurable/time bound targets to measure and reduce energy consumption (including all final energy: electricity, gas, fuel for trucks, ...).

Water and discharge

- Disclosing measurable and time bound targets to measure and reduce water withdrawal, water footprint, water withdrawal from water stressed areas, water consumption and improving the quality of their water discharge.
- Participating in thematic benchmarking such as Carbon Disclosure Project (CDP water).

Biodiversity

- Annually measure and reduce impact on pollution, climate change, overexploitation, invasive and endangered species and habitat loss.
- Participate on the thematic benchmarks such as Carbon Disclosures Project/ CDP forest.

Food losses and waste

- Annually measure and reduce food losses and waste according to the Food Loss and Waste Protocol in their supply chain.

Environmental compliance

- Disclose significant fines or non-monetary sanctions due to non-compliance with environmental laws and regulations.

Reducing animal-based products

- Annually measure and publicly report the percentage of animal-based products in the product range using an external reporting system audited externally.
- Disclose publicly available commitment to diversifying away from animal-based products.

Sustainable products

- Disclosing measurable and time bound target to increasing organic product sales.
- Disclosing measurable and time bound target to increasing labelled commodities in their product range.
- Publicly commit to increasing local and/or seasonal food in their product range.

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

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BACKGROUND

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

Food systems contribute significantly to chronic diseases, particularly via unhealthy diets. Meanwhile, the same food systems that harm individuals' health also pose threats to planetary health. Globally, food systems are estimated to account for one third of anthropological greenhouse gas emissions, while also posing a threat to water and biodiversity among others natural resources. Obesity and diet-related diseases are major public health problems in Belgium. One in two Belgian adults and one in seven adolescents are now overweight or obese¹. 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.

In Belgium

1 Out of **2** adults are overweight or obese¹

1 In **7** adolescents in Belgium are overweight or obese¹



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, and can be directly linked to performance targets of several SDGs², including:

- **SDG 2** : No hunger and reducing malnutrition in all its forms
- **SDG 3** : Good health and well-being
- **SDG 12** : Responsible consumption and production³

For global transformation of food systems to healthy and sustainable food systems, an integrated approach that simultaneously addresses environmental and health goals is essential to ensure long-term food security, environmental protection, and population health. This alignment not only helps in mitigating climate change but also promotes resilient food systems capable of sustaining future generations.

Seven SDGs with environmental dimensions have been identified, encompassing direct environmental aspects:

- **SDG 2**: Promoting sustainable agriculture
- **SDG 6**: Sustainable water management and sanitation
- **SDG 7**: Affordable, reliable, sustainable, and modern energy
- **SDG 12**: Sustainable consumption and production patterns
- **SDG 13**: Urgent action to combat climate change
- **SDG 14**: Conservation of oceans, seas, and marine resources
- **SDG 15**: Protect, restore, and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat³ desertification, and halt and reverse land degradation and halt biodiversity loss



² UN Sustainable Development Goals, UN Office for Partnerships

³ Global Nutrition Report 2017: Nourishing the SDGs. Bristol, UK: Development Initiatives ,

The food industry has an important role to play in improving population diets and developing a sustainable food system

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 environments⁴, 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.

On the other hand, promoting sustainability is crucial for companies as it helps mitigate environmental impact, ensures long-term resource availability, enhances brand reputation, and meets growing consumer demand for eco-friendly practices. The United Nations Sustainable Development Goals (SDGs) have outlined several actions to enhance their environmental sustainability, such as:

- Reducing greenhouse gas emissions: The food industry is encouraged to adopt practices that reduce emissions throughout the supply chain, from production to transportation, in alignment with SDG 13 (Climate Action).
- Promoting sustainable agricultural practices: Companies are urged to support and invest in sustainable farming techniques that conserve water, maintain soil health, and protect biodiversity, supporting SDG 2 (Zero Hunger) and SDG 15 (Life on Land).
- Minimizing waste: The industry should implement strategies to reduce food loss and waste, both in production and at the consumer level, in line with SDG 12 (Responsible Consumption and Production).
- Enhancing transparency and reporting: Providing clear, accurate information about sustainability practices and progress through comprehensive reporting helps consumers make informed choices and holds companies accountable, supporting SDG 12 (Responsible Consumption and Production).

These actions, as highlighted by the SDGs, emphasize the critical role that the food industry plays in achieving a sustainable future. By adopting these practices, companies can significantly contribute to environmental preservation, social equity, and economic viability.

BACKGROUND

We used the Business Impact Assessment Obesity and Population Nutrition (BIA-Obesity) and BIA Sustainability to assess the comprehensiveness, specificity and transparency of commitments to improve population nutrition and environmental sustainability. Both the BIA-Obesity and the BIA-Sustainability were developed by the International Network for Food and Obesity/Non-communicable Diseases (NCDs) Research, Monitoring and Action Support (INFORMAS)⁵ and are used in Belgium with the main purpose of providing support to food companies to improve both their commitments and practices related to obesity prevention and population nutrition and environmental sustainability. 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 assessment includes a scoring of commitments in regards to transparency, comprehensiveness and specificity. Phase 2 investigates the performance of companies if secondary data are available (i.e. healthiness of overall product portfolio, food marketing practices) and associations between commitments and performance for different domains. Only for BIA-Obesity secondary data were available to measure some indicators on practices; for BIA-Sustainability this was not the case, hence only commitments were collected and assessed.

METHODS

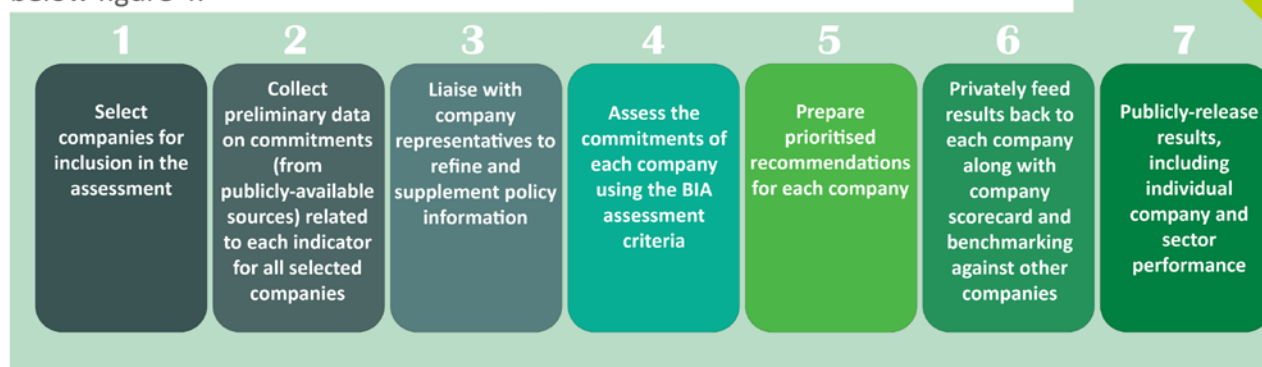
Study aims

This study assessed the largest Belgian food companies on their commitments and practices related to obesity prevention and population nutrition and environmental sustainability. The study included four industry sectors: packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets and quick service restaurants. The objective was to highlight where Belgian companies are demonstrating leadership in relation to obesity prevention and nutrition, and in parallel to environmental sustainability, and to identify areas for improvement in both fields.

Assessment of commitments

Food company commitments were assessed using the BIA-Obesity (Business Impact Assessment on Obesity and population nutrition) and BIA-Sustainability (Business Impact Assessment on Environmental sustainability) developed by INFORMAS, 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 and sustainability related commitments, performance (only related to nutrition commitments) and disclosure practices of global food and beverage manufacturers. Each tool includes sector specific indicators, that are tailored to the country context. BIA-Sustainability commitments were included up to 31st February 2024 and BIA-Obesity commitments 31st August 2024.

The process used to collect, verify and assess the commitments is detailed below figure 4.



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The assessment of company commitments was conducted using four criteria to ensure a thorough and contextually relevant evaluation. Transparency/disclosure examined the extent to which companies openly shared their policies, practices, and progress, emphasizing accountability and accessibility of information. Commitment relevancy to the Belgian context assessed whether the commitments were aligned with local priorities, cultural considerations, and regulatory frameworks, ensuring their applicability and impact within Belgium. Comprehensiveness focused on the scope of the commitments, ensuring they addressed multiple dimensions of sustainability, health, or other relevant themes, rather than isolated aspects. Finally, specificity evaluated the clarity and precision of the commitments, ensuring they were actionable, measurable, and not vague or generic in nature. These criteria collectively provided a robust framework to analyze the depth and effectiveness of company commitments.

Transparency/disclosure

Commitment relevancy to the Belgian context

Comprehensiveness

Specificity

Domains and scoring 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.

The score in each domain was weighted to derive an overall score for the BIA-Obesity out of 100. 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, (Table 1). 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.

The weighting of each domain also allows us to maintain comparability with the previous BIA-Obesity assessment despite some changes to indicators with domains. All indicators related to trans fat labeling were removed, as these are now covered by statutory requirements. In the previous version, the domains of product formulation, nutrition labeling, product and brand promotion, and product accessibility each included two separate indicators assessing the transparency and content of company commitments. The first indicator related to whether the company explicitly stated its stance towards government policy in the relevant domain, while the second indicator related to the content of that stance – whether the company supported or rejected government policy. The second indicator included negative scoring, so that the score was reduced if the company opposed government policy. In the new version, these indicators were combined into one indicator which assessed both the transparency and the content of company's responses to government policy. Finally, in the supermarkets sector, we added new indicators on prepared or ready to eat foods, as these represent a growing trend in supermarket food retail.

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Table 1. The weighting of BIA-Obesity Domains

BIA-Obesity	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%

Although many of the indicators are the same across sectors, there are also differences. For example, some indicators might not be applicable for a certain sector (e.g., commitments to reduce saturated fats for non-alcoholic beverage manufacturers) or some indicators are sector-specific (e.g., commitments on confectionery free check-outs for supermarkets or free drink refills for quick service restaurants).

We conducted double scoring for the commitments of a sample of companies. A second researcher independently scored 15 companies (about half of the total number of companies), based on the collected data and information, without knowledge of the initial scores. The results showed >95% agreement between the two sets of scores, indicating a high level of consistency. The discrepancies were solved in consultation with a third researcher.

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Table 2. BIA-Obesity domains and indicator examples for different domains

Domain	Policy area	Examples of key indicators
A Corporate population nutrition strategy	Overarching policies and commitments to improving population nutrition and addressing obesity	<ul style="list-style-type: none"> 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, added sugar) and energy content	<ul style="list-style-type: none"> Targets and actions related to the reduction of sodium, saturated fat, sugar and portion size/energy content across portfolio Engagement with government-led initiatives related to product formulation (e.g., the Convention for a Balanced Diet)
C Nutrition labelling	Policies and commitments regarding disclosure and presentation of nutrition information on product packaging and online	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Increasing the proportion of healthy products in the product portfolio Support of fiscal policies (e.g. a tax on sugar-sweetened beverages) Pricing and discounting strategies Check-outs free from unhealthy items Not provide free refills for sugary drinks
F Relationships with other organizations	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	<ul style="list-style-type: none"> Disclosure and transparency of relevant relationships Accessibility of relevant information No political donations or declaration of those in real-time

Domains and scoring of the BIA-Sustainability

The BIA-Sustainability is comprised of ten different domains. Table 3 shows the domains, together with an example of an indicator and its associated scoring criteria. For the BIA-Sustainability, the domains are not weighted, as the relative importance of the domains would likely vary from country to country. For example, in a country which has both areas of water stress⁹ and industries that use a lot of water, the water and discharge domain might carry more weight than in other countries. However, similar to the BIA-Obesity, the tool is, of course, adapted to reflect the legislative and policy background in the relevant country. For example, in EU countries, companies do not get a score for commitments that merely comply with EU regulation such as regulation of single-use plastics.¹⁰ The scoring system enables each company assessed using the BIA-Sustainability tool to be allocated a score out of 100 by policy domain. Unlike for the BIA-Obesity, no overall score is calculated for the BIA-Sustainability.

Table 3. BIA-sustainability and indicator examples for different domains

Domain	Sample indicator	Scoring of sample indicator
Corporate sustainability strategy	Indicator 1: Does the company have an overarching commitment to reducing environmental impact articulated in strategic documents (e.g., mission statement, strategies, or overarching policies)?	<p>Maximum of 8 points, broken down as follows:</p> <ul style="list-style-type: none"> Publicly available commitment (2 points) Does the company participate in the UN Global Compact OR does it disclose alignment with the SDGs? (2 points) The commitment includes specific objectives (2 points) The commitment includes measurable targets (2 points)
Packaging	Indicator 7: Does the company and its suppliers have a commitment to locally relevant recovery pathways for packaging (Systems for reuse, recycling, composting or energy recovery, for instance waste recycling, local valorisation, production of biogas, ...)?	<p>Maximum of 13 points, broken down as follows:</p> <ul style="list-style-type: none"> Does the company make a commitment? (1 point) Does the company make at least one commitment in relation to its suppliers' packaging recovery practices? (4 points) Is the commitment publicly available? (2 points) <p>Is the commitment:</p> <ul style="list-style-type: none"> o specific? (2 points) o measurable? (2 points) o time-bound? (2 points)

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Emissions	<p>Maximum of 15 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company measure its own GHG emissions? (1 points) • Does the company measure GHG emissions from at least one of its suppliers? (4 points) • Are the results of the measurements reported at least once per year? (2 points) • Is the report publicly available? (2 points) • Does the company report its emissions using an external reporting system such as the Global Reporting Initiative (GRI)? (2 points) • Is the report audited externally? (2 points) • Does the company participate in a relevant thematic benchmarking system such as the Science Based Targets Initiative or the Carbon Disclosure Project? (2 points)
Energy Use	<p>Maximum of 30 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company make a commitment to reduce its energy consumption? (2 point) • Does the company make at least one commitment in relation to its suppliers' use of energy? (8 points) • Is the commitment publicly available? (4 points) • Is the commitment: <ul style="list-style-type: none"> o specific? (4 points) o measurable? (4 points) o time-bound? (4 points) o expressed relative to an absolute value? (4 points)
Water and discharge	<p>Indicator 23: Does the company and its suppliers measure the quality of their water discharge?</p> <p>Maximum of 13 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company measure the quality of its water discharge? (1 point) • Does the company measure the quality of the water discharge from at least one of its suppliers? (4 points) • Are the results of the measurements reported at least once per year? (2 points) • Is the report publicly available? (2 points) • Does the company report its emissions using an external reporting system such as the Global Reporting Initiative (GRI)? (2 points) <p>Is the report audited externally? (2 points)</p>
Biodiversity	<p>Indicator 27: Does the company and its suppliers have a commitment to protecting habitats?</p> <p>Maximum of 15 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company make a commitment to protect habitats? (1 point) • Does the company make at least one commitment in relation to its suppliers' impact on habitats? (4 points) • Is the commitment publicly available? (2 points) • Is the commitment: <ul style="list-style-type: none"> o specific? (2 points) o measurable? (2 points) o time-bound? (2 points) • Does the company participate in a relevant thematic benchmarking system such as the Science Based Targets Initiative or the Carbon Disclosure Project? (2 points)

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Food loss and waste	Indicator 29: Does the company have a commitment to reducing food loss and waste in their supply chain?	<p>Maximum of 17 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company make a commitment to reduce food loss and waste in its supply chain? (1 point) • Does the company make at least one commitment to reduce food loss and waste in its ? (8 points) • Is the commitment publicly available? (4 points) • Is the commitment: <ul style="list-style-type: none"> o specific? (4 points) o measurable? (4 points) o time-bound? (4 points) o expressed relative to an absolute value? (4 points)
Environmental Compliance	Indicator 31: Has the company disclosed significant fines or non-monetary sanctions for non-compliance with environmental laws and regulations? (Publicly available document)	<p>Maximum of 4 points:</p> <ul style="list-style-type: none"> • Does the company make a publicly-available declaration that it has not received any fines or sanctions for non-compliance with environmental laws and regulations? (4 points)
Reducing animal-based products	Indicator 32: Does the company measure the percentage of animal-based products in their product	<p>Maximum of 8 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company measure the percentage of animal-based products in its range? (1 point) • Are the results of the measurements reported at least once per year? (2 points) • Is the report publicly available? (2 points) • Is the report audited externally? (2 points)
Increasing the proportion of sustainable products	Indicator 42: Does the company commit to increase the amount of local and or seasonal food in the product range?	<p>Maximum of 10 points, broken down as follows:</p> <ul style="list-style-type: none"> • Does the company make a commitment to increase the amount of local and or seasonal food in the product range? (2 points) • Is the commitment publicly available? (2 points) • Is the commitment: <ul style="list-style-type: none"> o specific? (2 points) o measurable? (2 points) o time-bound? (2 points)

Assessment of performance

Assessment of performance or company practices was only possible for the BIA-Obesity, but not for the BIA-Sustainability as we did not have access to secondary data in this case. For some of the BIA-Obesity policy domains, a set of key performance indicators was selected to assess company's practices on population nutrition. The selected indicators, as well as the sources where the data were derived from and the years, are presented in the table 4. 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. Unlike for the 2019 assessment, no data on 'Nutrition labelling' (i.e. % of products with Nutri-Score on pack) is reported. For the other BIA-Obesity domains, some specific indicators were included, dependent on data availability and feasibility of the assessment and dependent on the sector. An overview of the different performance indicators can be found below.

Table 4. Selected indicators, and data sources

SECTOR	BIA-OBESITY	PERFORMANCE	DATA SOURCES	YEARS
PACKAGED FOOD AND NON-ALCOHOLIC BEVERAGE	Corporate population nutrition strategy	/	/	/
	Product formulation	For full product portfolio and selected food categories: <ul style="list-style-type: none"> • Mean (standard deviation) salt content (g/100g) • Mean (standard deviation) total sugar content (g/100g) • Mean (standard deviation) saturated fat content (g/100g) • Mean (standard deviation) energy content (kJ/100g) • Median Nutri-Score • % of products with Nutri-Score A and B • % of products with Nutri-Score D and E • % of products that are ultra-processed 	Nutritrack branded food composition database Belgium	2023
	Nutrition labelling	/	/	/
	Product and brand promotion	For full product portfolio and for selected food categories:	Nutritrack branded food composition database Belgium	2023

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		% of products not-permitted to be marketed to children according to the World Health Organisation Regional Office for Europe nutrient profile model (WHO-Model 2015)		
	Product accessibility	/	/	/
	Relationships with other organisations	/	/	/
QUICK SERVICE RESTAURANTS				
	Corporate population nutrition strategy	/	/	/
	Product formulation	/	/	/
	Nutrition labelling	/	/	/
	Product and brand promotion	Outlet density around schools: Proportion of outlets within 500m road network distance from primary schools (Flanders, Wallonia, Brussels) Proportion of outlets within 500m road network distance from secondary schools (Flanders, Wallonia, Brussels)		
		Locatus food retail database		2022
	Product accessibility	/	/	/
	Relationships with other organisations	/	/	/
	Corporate population nutrition strategy	/	/	/
SUPERMARKETS				
	Product formulation	<i>For full own-brand product portfolio and for selected food categories:</i> <ul style="list-style-type: none"> • Mean (standard deviation) salt content (g/100g) • Mean (standard deviation) total sugar content (g/100g) • Mean (standard deviation) saturated fat content (g/100g) • Mean (standard deviation) energy content (kJ/100g) • Median Nutri-Score • % of Nutri-Score A and B • % of Nutri-Score D and E • % of products that are ultra-processed 		Nutritrack branded food composition database Belgium 2023

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Nutrition labelling	/	/	/
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	Nutritrack branded food composition database Belgium	2023
Product accessibility	The cumulative linear shelf length ratio for healthy versus unhealthy foods in-store % of foods at check-outs that are ultra-processed % of foods at end-of-aisle endcaps (front of store) that are ultra-processed	Food environments in Flanders study	2022
Relationships with other organisations	/	/	/

METHODS

For packaged food and non-alcoholic beverage manufacturers and supermarkets (own-brand products), the healthiness of the product portfolios was analysed using the data from the Nutritrack branded food database 2023. Pictures of all food products available in Lidl and Aldi were taken and the nutritional information was registered in the database. For Delhaize, Colruyt and Carrefour web scraping was used to gather the nutritional data. The nutritional content of the product portfolios was analysed per food category. Data were not weighted for sales as no sales data were available. The food products available on the Belgian market in 2023 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'). Smaller food categories are used throughout the report for benchmarking nutritional contents across food companies. For this project, alcoholic beverages, infant formula and baby foods were excluded.

Table 5. Food and non-alcoholic beverage products main and sub categories that being used in this report

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

METHODS

The healthiness of the entire portfolios and/or by food category/sub category was analysed using the Nutri-Score, which is the official front-of-pack labelling system in place in Belgium since April 2019. The proportion of products with Nutri-Score A, B,C,D and E was determined, as well as the median Nutri-Score across the company's portfolio or menu. The company's portfolios were also analysed in relation to the proportion of ultra-processed foods (according to the NOVA classification) and products not permitted to be marketed to children according to the WHO Europe nutrient profile model (WHO-Model).

A sample of 55 supermarkets across the five chains was selected in 2022, about 64% in the most deprived socioeconomic areas. Healthiness indicators related to food availability (ratio of cumulative linear shelf length for healthy versus unhealthy foods) and prominence (proportion of unhealthy foods at check-outs and end-of-aisle end-caps) were measured. The detailed methods are available elsewhere⁸.

For quick service restaurants, the mean density of outlets within 500 m road network distance from the entrance of primary as well as secondary schools was analysed using the Locatus database of food retailers (2022) for Flanders, Brussels and Wallonia. For Lunch Garden, results on this are not available.

8 <https://pubmed.ncbi.nlm.nih.gov/37608383/>

Selection of food companies

Where possible, company selection was based on market share data retrieved from Euromonitor, accessed through the Passport database⁹. Euromonitor collects data on markets from government departments and other official sources, as well as from trade organizations, trade and mainstream press, and companies themselves. We downloaded market share data by country, industry sector and company or by brand depending on the industry. Table 6. shows an overview of the datasets that were downloaded.

The selection was based on market shares in 2021 as this was the most recent full-year data available at time of selection. In selecting companies, our goal was, where feasible, to select companies whose total combined market share would be at least 50%. This ensures that our final results will give a reasonable representation of the market as a whole.

In total, 33 companies (19 packaged food and non-alcoholic beverage manufacturers for BIA-Obesity /20 packaged food and non-alcoholic beverage manufacturers for BIA-Sustainability , 3 non-alcoholic beverage manufacturers, 5 supermarkets and 6 quick service restaurants) have been selected in Belgium (Table 6).

Table 6. 33 selected companies for BIA-Obesity and BIA-Sustainability 2023, Belgium

Sector	Companies included
Packaged food manufacturers	Mondelēz Unilever Nestlé Danone Friesland Campina PepsiCo ¹ Ter Beke/ What's cooking? Ferrero Mars Kellogg's Iglo Dr. Oetker McCain

⁹ <https://www.euromonitor.com>

METHODS

	Bel Group Lactalis group Monde Nissin Casa Tarradellas Baronie De Heer Roger & Roger
Non-alcoholic beverage manufacturers	Coca-Cola PepsiCo ¹ Suntory Spadel ²
Quick service restaurants	McDonald's Quick Panos Pizza Hut Exki Lunch garden
Supermarkets	Colruyt Delhaize Aldi Carrefour Lidl

1 Evaluated as both a packaged food as well as non-alcoholic beverage manufacturer.

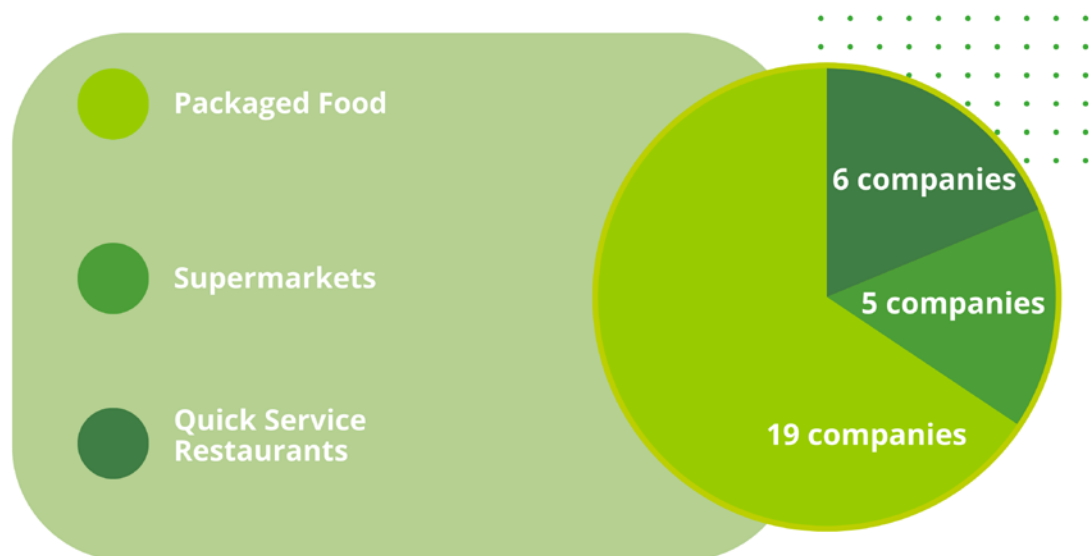
2 Spadel has been assessed only for sustainability as the company manufacture mineral water.

RESULTS



Company commitments on obesity and population nutrition in Belgium 2023/2024

We assessed a total of 32 companies for the BIA-Obesity study (excluding Spadel, which was only part of the BIA-Sustainability assessment)¹⁰. These companies span sectors including packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets, and quick service restaurants. The ranking of food companies by sector was based on the specificity, comprehensiveness, and transparency of their commitments related to obesity prevention and population nutrition in Belgium (2023/2024).



The BIA-Obesity summary dashboard of overall scores for the transparency, comprehensiveness and specificity of food company commitments by sector and food company can be found below in figure 5.

¹⁰ Spadel is assessed for BIA-sustainability and has not been included here

RESULTS

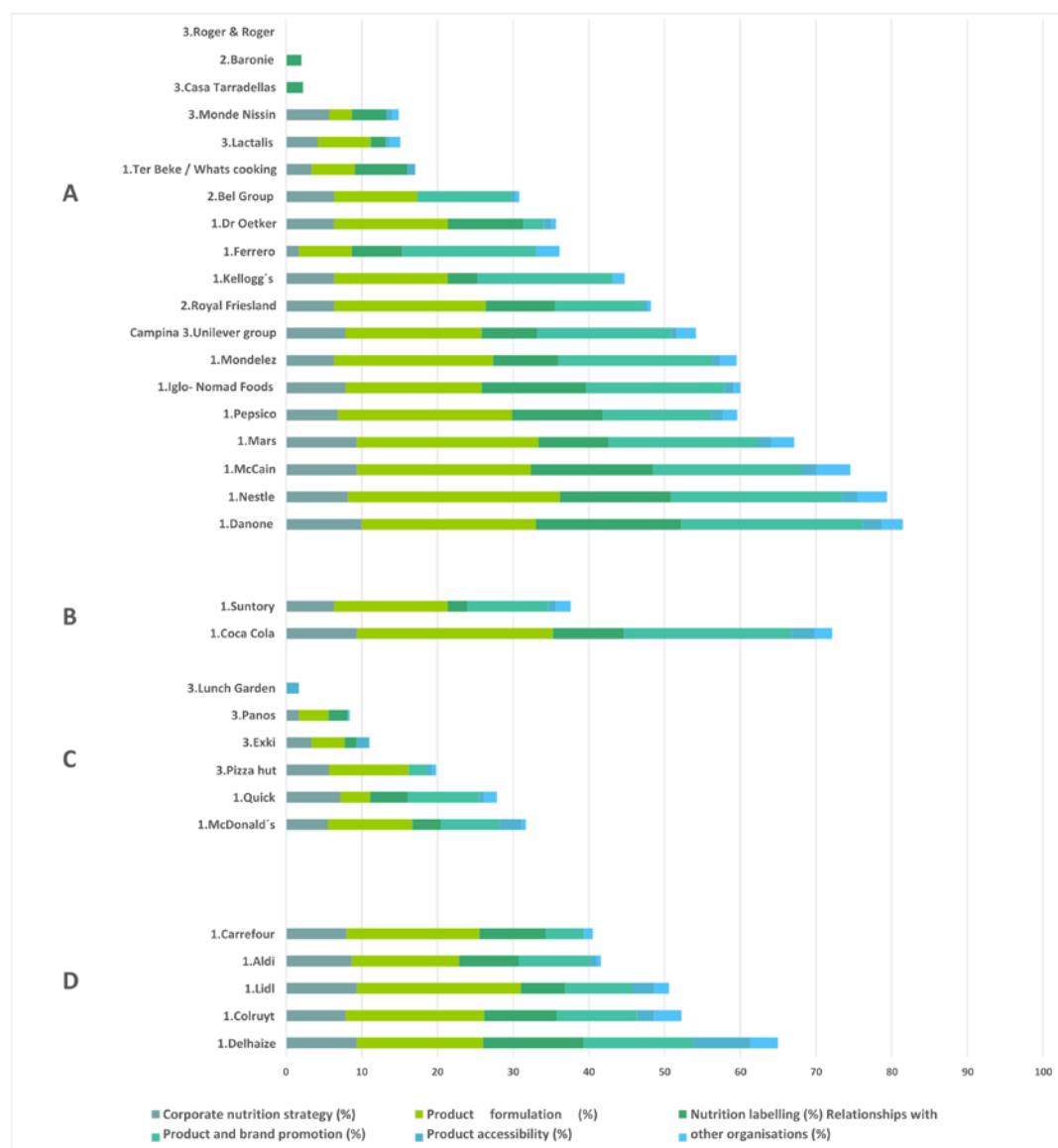


Figure 5. Business Impact assessment on Obesity and Population Nutrition (BIA-Obesity) Belgium 2023/2024

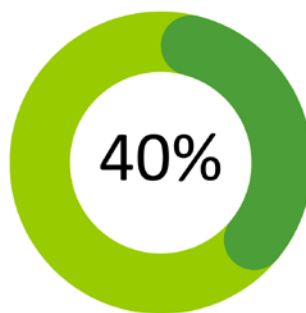
for A: Packaged food, B: Non-alcoholic beverage manufacturers, C: Quick Service Restaurants, D: Supermarkets

Group 1: Full engagement with the process (N=20); Group 2: Accepted participation, but contributions not received in time (N=3);

Group 3: Due to Lack of contact, the assessment of commitments was based on publicly available information only (N=9).

RESULTS

Belgian food companies demonstrated some commitment to addressing obesity and improving population nutrition issues, but much stronger action is needed across all six BIA-Obesity domains and all four industry sectors. The best performing domain was 'Product formulation' while the worst performing domain was 'Product accessibility'. The overall scores ranged from 0% to 82% with a median overall score of 40%.

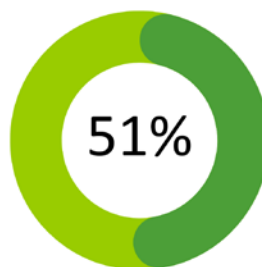


Median overall score

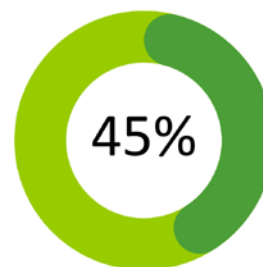
The median overall score was 15% for quick service restaurants, 51% for supermarkets, and 45% for packaged food and non-alcoholic beverage manufacturers. Generally, overall scores and domain-specific scores were lower for quick service restaurants than for packaged food and non-alcoholic beverage manufacturers and supermarkets.



Quick Service Restaurants



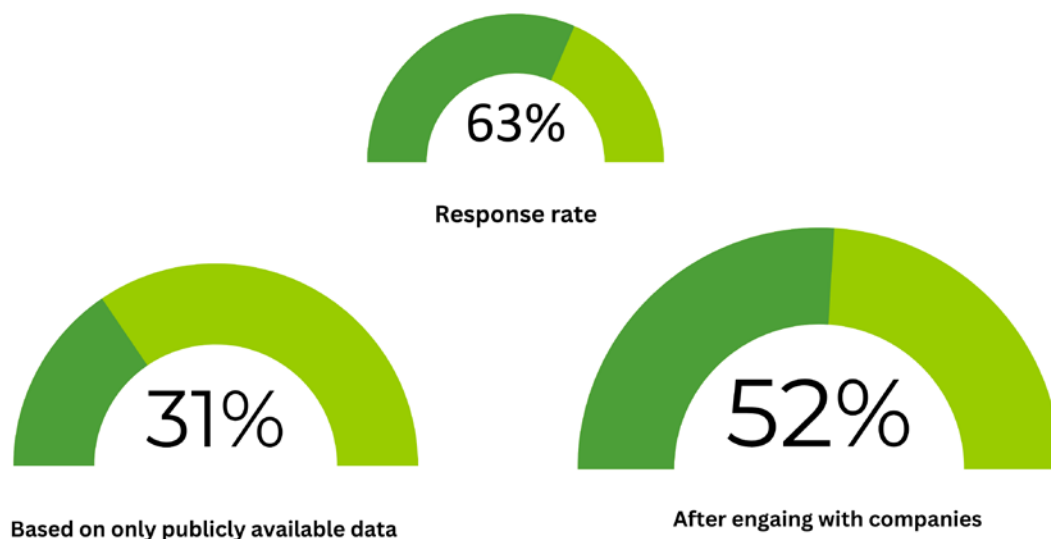
Supermarkets



Packaged food and
non-alcoholic beverage manufacturers

RESULTS

For packaged food and non-alcoholic beverage manufacturers, the top-scoring companies were companies that fully engaged with the BIA-Obesity tool and process. 63% (20 companies out of 32) of the selected Belgian companies, including all selected supermarkets, fully engaged with the research process and provided feedback and validation in time during several steps in the process. This is a similar percentage as in 2019. 3 companies (9%) accepted to participate but we did not receive feedback from them in time. While, no company actively rejected, for the remaining companies (28%, N=9), we were unable to get an answer from them. It is important to note that company scores significantly improved (overall score median score based on only publicly available commitment was 31% and after engaging with the companies, it increased to 52%) after engagement with the process and that the overall score of companies that did engage was significantly higher than those companies that didn't.



RESULTS

Best available company commitments to improve food environments

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

Table 7. Best available company commitments in BIA-Obesity 2023/2024.

Domain	Company	Country	Examples of best practice commitments
A. Corporate nutrition strategy	Danone	Belgium	Danone includes SMART (specific, measurable, achievable, relevant and time bound) objectives and targets within the overarching nutrition strategy, key performance indicators, and refers to global priorities e.g. World Health Organization recommendations and Sustainable Development Goals, as well as national priorities e.g. Convention for a Balanced Diet. Regular reports are available at national level, including reporting against objectives and targets and progress made on each of the 50 sustainability targets defined under the Sustainability Strategies.
B. Product formulation	Nestlé	Belgium	Nestlé commits to specific, time-bound targets to reduce salt, saturated fats, sugar and energy content/ portion size through the publicly available Nestlé Nutrition Foundation (NF) targets since 2020.
C. Nutrition labelling	McCain	Belgium	McCain commits to label all their own-brand packaged food products with Nutri-Score and to label all products in-store and online with Nutri-Score.
D. Product and brand promotion		Belgium	<i>A best practice example could not be highlighted for the Product and Brand Promotion domain, as the highest scores were shared by companies complying with the Belgian Pledge and EU Pledge</i>

RESULTS

E. Product accessibility	Colruyt	Belgium	Colruyt has a commitment that checkouts are free from unhealthy items (including confectionery, chocolate and soft drinks).
	Danone	Belgium	Danone publicly discloses its policy position on sugar taxes on the website and supports some forms of taxation on unhealthy food products by government
	Delhaize	Belgium	Delhaize commits to price reductions on Nutri-Score A and B
	Nestlé	Belgium	Nestlé published its nutritional strategy with the ambition to bring tasty and balanced diets within the reach of billions of people for today and for generations to come. To help us deliver on our ambition we have set two priorities: Guide consumers towards balanced consumption and to grow the sales of more nutritious products (products with nutri-score A and B - and specialized nutrition products) by CHF 20-25 billion by 2030, representing about 50% growth over 2022 sales.
F. Relationships with external organizations	Unilever	Global, including Belgium	Unilever releases a comprehensive list of the external organizations they support financially. This includes detailed information about the nature, date, and amount of funding provided to research institutions, health professionals, scientific experts, professional organizations, and partnerships related to health and nutrition. The data is available in their website and updates annually to ensure transparency and up-to-date reporting.

Recommendations to improve commitments

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

All sectors

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

Packaged food and non-alcoholic beverage manufacturers and supermarkets

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

Quick Service Restaurants

- Providing nutrition information about foods and meals online

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

RESULTS

Corporate population nutrition strategy

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

Product formulation

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

Nutrition labelling

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

Product and brand promotion

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

Product accessibility

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

Relationships with other organizations

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

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

BIA-OBESITY FINDINGS BY SECTOR

Packaged food and non-alcoholic beverage manufacturers

Commitments

Top performers like Danone and Nestle set benchmarks in multiple domains, particularly in corporate nutrition strategies and product formulation. Middle performers need to focus on weaker scores for certain domains to improve their overall scores. Lower performers have substantial room for improvement across all domains. The wide range of scores across companies within this sector highlights the value of the tool to discriminate between better and worse commitments and highlights the possibility for industry-wide improvements in commitments made.



RESULTS

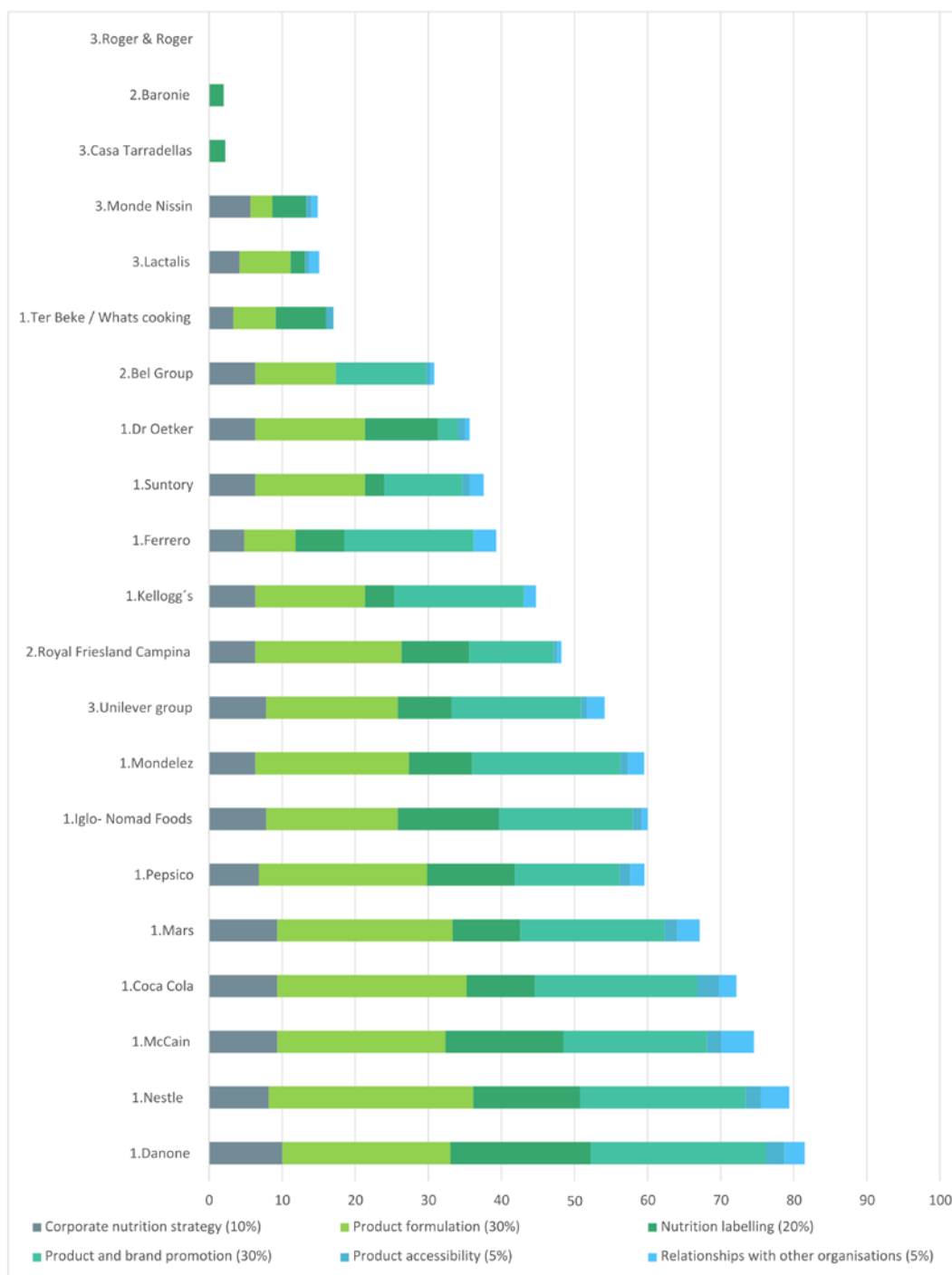


Figure 6. Overall result of BIA-Obesity 2023 for packaged food and non-alcoholic beverage manufacturers.

Group 1: Full engagement with the process; Group 2: Accepted participation, but contributions not received in time; Group 3: Due to Lack of contact, the assessment of commitments was based on publicly available information only .

RESULTS

Table 8. Scores of packaged food and beverage manufacturers by BIA-Obesity domain.

	Weighting (%) in overall score	Median score (%)	Range of scores (%)	Highest scores
STRAT: Corporate population nutrition strategy	10	63	0-100	Danone (100%), McCain (93%)
FORM: Product formulation	30	50	0-93	Nestle (93%), Coca Cola (86%)
LABEL: Nutrition labelling	20	37	0-96	Danone (96%), McCain (81%).
PROMO: Product and brand promotion	30	48	0-80	Danone (80%), Nestle (75%)
ACCESS: Product accessibility	5	20	0-60	Coca Cola 60% Danone (50%)
RELAT: Relationships with other organisations	5	33	0-89	McCain (89%), Nestle (78%)
OVERALL BIA-Obesity score	100	45	0-82	Danone (82%), Nestle (79%).

The median overall score for the commitments of packaged food and non-alcoholic beverage manufacturers (45%) was close to the median overall score for all companies (40%) (including quick service restaurants and supermarkets). The best performing company was Danone with an overall score of 82% while the worst performing company was Roger and Roger with an overall score of 0% and 0% score in all the BIA-Obesity domains. Corporate population nutrition strategy has the highest median score (63%) and a full range (0-100%), while it indicates that some companies like Danone, McCain and Nestle excel in their corporate population nutrition strategy, other companies do not have publicly available commitments regarding to nutrition and health. Product formulation is the second best performing domain for the packaged food and non-alcoholic beverage manufacturers (50%), with Nestle, Coca Cola and Mars excelling as the top three companies. Product accessibility has the lowest median score (20%) and a range up to 60%, showing it is the weakest domain in the assessment. None of the packaged food or non-alcoholic beverage manufacturers obtained a maximum score for any of the policy domains. Casa Tarradellas, Baronie and Roger & Roger had almost no commitments in any of the domains and scored below 2%, indicating significant room for improvement and transparency across all domains. 13 out of 21 packaged food and non-alcoholic beverage manufactures fully engaged with the assessment process. The overall scores suggest that while some companies are making strides, there is a considerable opportunity for improvement across the board.

RESULTS

Performances

Figure 7. is showing the proportion of food products within company portfolios across 11 food categories. Nestlé and Unilever had food products within nine while Mondelez and Dr. Oetker had food products within eight out of the eleven food categories. For some companies (Monde Nissin and Casa Terradellas) the Nutritrack did not have any of their products represented.

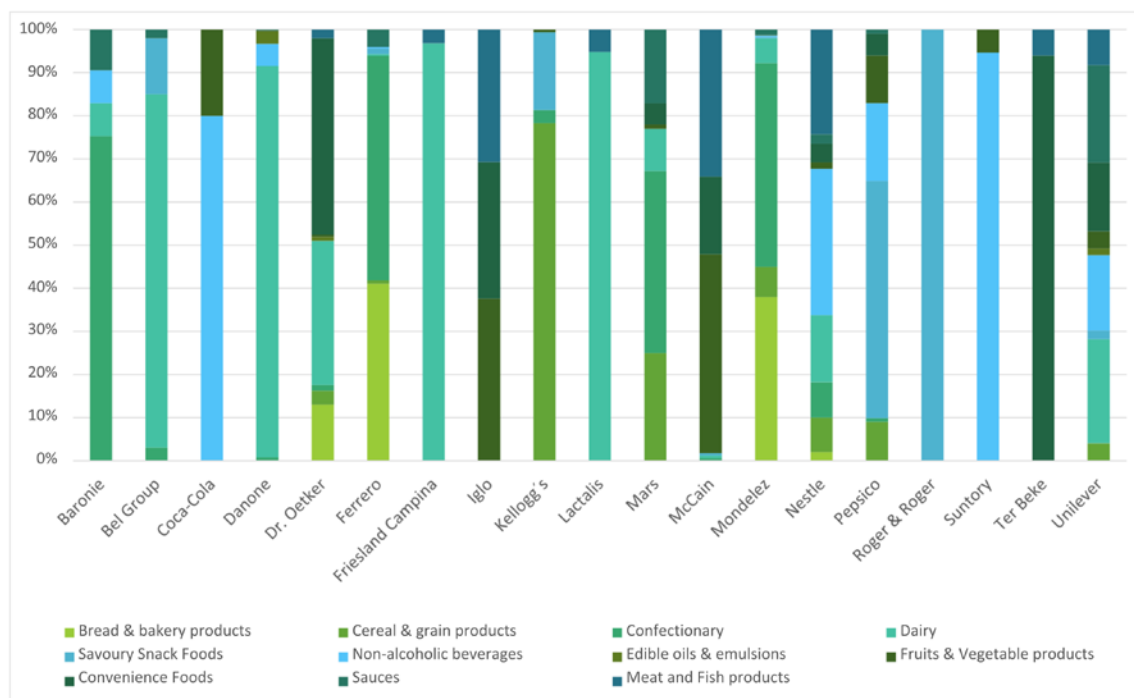


Figure 7. An overview of the proportion of food and non-alcoholic beverage products per food category for the selected packaged food and non-alcoholic beverage manufacturers (Nutri-track Belgium 2023).

RESULTS

The table below presents a comparative analysis of various packaged food and non-alcoholic beverage manufacturers, evaluating their products across different categories based on key nutritional metrics. It identifies the healthiest and least healthy products within each category, considering factors such as energy, sugar, saturated fat, and salt content. This assessment provides a snapshot of the nutritional quality of offerings from prominent brands, highlighting significant disparities in how companies meet health-related nutritional standards.

Table 9. The best (top) and worst (bottom) performing packaged food and non-alcoholic beverage manufacturer(s) per product category and per nutrient of concern (Nutrtrack Belgium, 2023)

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)
Cakes, muffins and pastries N = 5201	Healthiest	Dr Oetker 1,358.6 (585.1)	Nestle 1.2 (0.6)	Dr Oetker 8 (6.3)	Nestle 1.1 (0.1)
	Least healthy	Ferrero 1,870.4 (74.8)	Ferrero 37.7 (5.5)	Ferrero 14.9 (2.0)	Mondelez 0.6 (0.2)
Biscuits N = 7151	Healthiest	PepsiCo 1,719.8 (74.5)	PepsiCo 3.2 (0.5)	PepsiCo 1.0 (0.3)	Nestle 0.3 (0.2)
	Least healthy	Nestle 2,132.5 (84.3)	Nestle 50.1 (5.1)	Mars 14.4 (0.5)	PepsiCo 1.0 (0.3)
Bread N = 2261	Healthiest	Dr. Oetker 823.0 (52.3)	Nestle 1.1 (0.9)	Unilever 2.6 (0.9)	Unilever 0.9 (0.1)
	Least healthy	Unilever 1,247.3 (47.5)	Unilever 5.4 (1.4)	Dr Oetker 3.1 (0.2)	Nestle 1.7 (0.3)
Breakfast Cereal N = 3301	Healthiest	Nestle 1,662.9 (79.0)	PepsiCo 12.3 (7.5)	Kellogg's 3.6 (7.4)	PepsiCo 0.2 (0.2)
	Least healthy	Mondelez 1,768.5 (124.5)	Kellogg's 23.0 (7.3)	PepsiCo 1.9 (1.2)	Mondelez 0.9 (0.4)
Chocolate and sweets N = 8791	Healthiest	Danone 506.0 (9.9)	Unilever 5.8 (NA))	Danone 2.6 (1.4)	Danone 0.2 (0.1), Ferrero 0.2 (0.1)
	Least healthy	Ferrero 2,276.1 (285.9)	Mars 59.4 (11.0)	Baronie 18.1 (5.3)	Unilever 0.6 (NA)
Cheese N = 7431	Healthiest	Danone 356.7 (150.8)	Mars 0.0 (0.0)	Danone 2.8 (2.6)	Danone 0.6 (1.8)
	Least healthy	Mars 1,990.0 (0.0)	Danone 9.3 (5.2)	Mars 23.5 (0.0)	Mars 2.4 (0.0)

RESULTS

Dessert N = 2161	Healthiest	Danone	462.4 (164.8)	Friesland Campina	Danone 2.4 (1.9)	Baronie 0.1 (0.1)
	Least healthy	Baronie	2,125.7 (64.9)	Baronie 57.7 (3.6)	Ferrero 21.2 (NA)	Dr Oetker 0.4 (0.3)
Yoghurt and yoghurt drinks N = 4991	Healthiest	Danone	335.5 (199.3)	Friesland Campina	Danone 1.9 (2.1)	Friesland Campina 0.1 (0.0) Nestle 0.1 (0.0)
	Least healthy	Nestle	387.7 (122.5)	Danone 8.9 (4.2)	Friesland Campina 2.1 (1.5)	Danone 0.2 (0.2)
Ice cream and edible ices N = 4811	Healthiest	Unilver	968.3 (349.2)	Unilever 21.4 (6.2)	Mars 8.3 (2.0)	Mars, Mondelez , Unilver 0.2 (0.1)
	Least healthy	Mondlez	1,475.3 (37.3)	Mondelez 29.4 (0.9)	Mondelez 12.9 (0.3)	Nestle 0.3 (0.1)
Crisps and snacks N = 4211	Healthiest	Bel	1,282.2 (101.8)	Bel 1.0 (1.1)	Mondelez 2.6 (0.2)	Kellogg's 1.2 (0.1)
	Least healthy	Ferrero	2,215.8 (114.8)	Ferrero 30.4 (11.5)	Ferrero 16.1 (7.4)	Unilever 1.9 (0.9)
Fruit and vegetable juices N = 3661	Healthiest	Suntory	118.5 (21.7)	Suntory 5.1 (3.4)	N/A ¹	N/A
	Least healthy	Coca-Cola	187.6 (24.6)	Coca Cola 9.6 (1.2)	N/A	N/A
Soft drinks N = 7721	Healthiest	PepsiCo	26.5 (49.6)	PepsiCo 1.5 (3.0)	N/A	N/A
	Least healthy	Danone	137.5 (223.6)	Nestle 6.4 (3.0)	N/A	N/A
Pizza N = 1931	Healthiest	Ter Beke	764.5 (98.3)	Nestle 3.1 (1.1)	Ter Beke 1.7 (0.8)	Ter Beke 1.0 (0.0)
	Least healthy	Dr. Oetker	945.8 (83.2)	Ter Beke 4.4 (1.6)	Dr Oetker 3.6 (1.0)	Nestle 1.2 (0.3)
Soup N = 3591	Healthiest	PepsiCo	167.2 (22.4)	Unilever 2.0 (1.8)	PepsiCo 0.3 (0.1)	PepsiCo 0.6 (0.1)
	Least healthy	Iglo	667.9 (12.9)	Iglo 8.3 (7.2)	Iglo 1.5 (0.9)	Iglo 1.6 (0.3)
Ready meal N = 8141	Healthiest	Iglo	452.8 (127.9)	Iglo 2.0 (0.9)	Nestle 0.5 (0.2)	Mars 0.6 (0.1), Iglo 0.6 (0.2)
	Least healthy	Nestle	1,509.0 (48.1)	Unilever 3.7 (3.4)	McCain 4.7 (3.1)	Unilever 1.4 (0.8)
Meat alternative N = 2601	Healthiest	Unilever	728.7 (161.6)	Unilever 1.1 (0.6)	Iglo 0.9 (0.2)	Iglo 1.1 (0.1) Nestle 1.1 (0.2)
	Least healthy	McCain	1,044.6 (60.1)	Nestle 2.1 (1.0)	McCain 5.3 (0.5)	Unilever 1.6 (0.5)
Meat and processed meat N = 1,7251	Healthiest	Ter Beke	735.6 (89.9)	Iglo 0.5 (0.1)	Iglo 1.6 (0.1)	Iglo 1.0 (0.0)
	Least healthy	Iglo	1,071.6 (39.6)	Dr Oetker 3.0 (0.4)	Unilever 5.8 (2.5)	Nestle 1.9 (0.4) Unilever 1.9 (0.7)

1. N/A= Not applicable

RESULTS

The highest proportion of Nutri-Score A products belongs to Iglo (64%), followed by McCain at 47%, while Baronie, Roger and Roger, Ferrero and Suntory had 0% products with Nutri-score A. The companies with the highest proportion of Nutri-score E were Baronie and Ferrero at 85% and 76% respectively. However, the lowest proportion of Nutri-Score E products (0%) were Iglo, Kellogg's, McCain, Roger & Roger, Ter Beke and Danone, Figure 8.

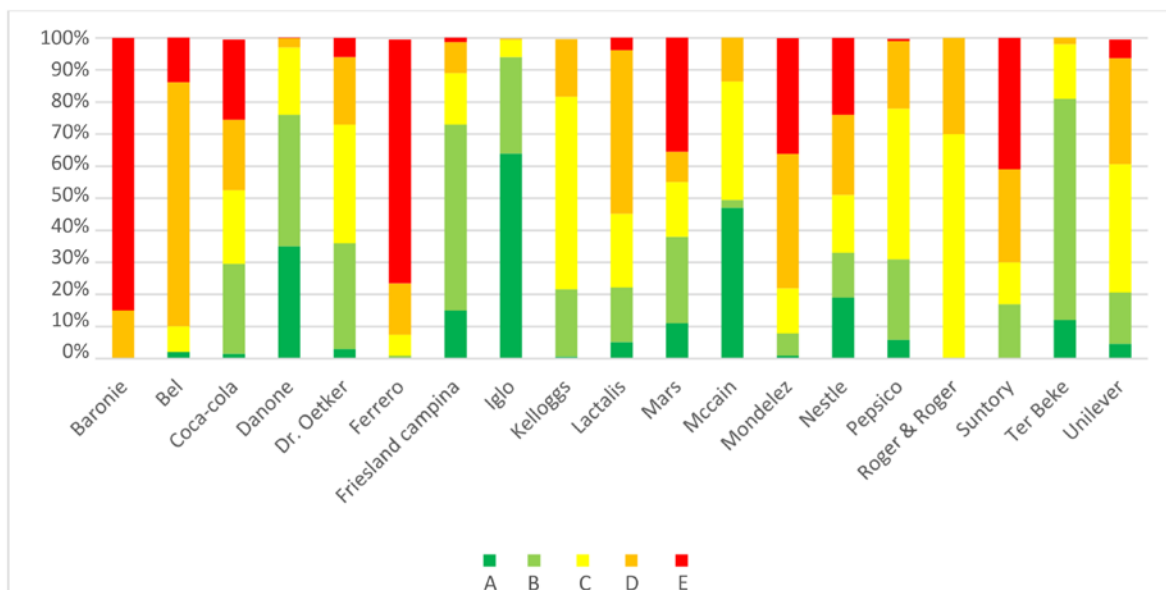


Figure 8. The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers (Nutrtrack Belgium, 2023).

Figure 9 reveals notable findings regarding the marketing of products to children, the extent of ultra-processed foods (NOVA classification), and the percentage of products with Nutri-Score D-E among selected manufacturers. Baronie, Ferrero and Roger & Roger have the highest proportion of products not permitted for marketing to children, both at 100%. In contrast, Iglo has the lowest percentage of such products, at 14%, followed by Ter Beke/What's Cooking? at 5%.

RESULTS

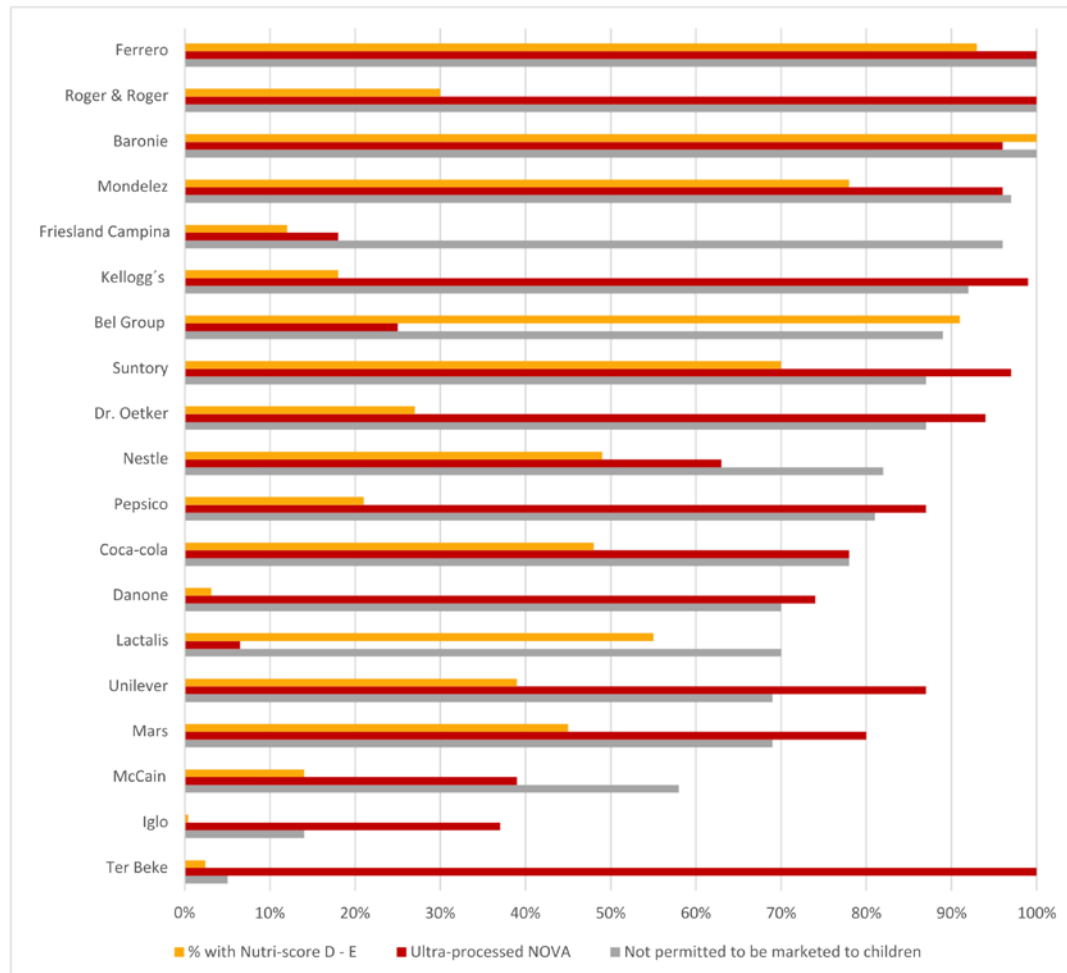


Figure 9. The percentage of products not-permitted to be marketed to children, ultra-processed and with Nutri-score D or E within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers. (Nutrtrack Belgium, 2023).

In terms of ultra-processed foods, Ferrero, Ter Beke, Roger & Roger, and Kellogg's lead with 100% of their products classified as ultra-processed, while Lactalis has the lowest percentage at 6.5%. When examining the percentage of products with Nutri-Score D-E, Baronie ranks the highest at 100%, followed by Bel and Ferrero with 91% and 93%, respectively. Conversely, Ter Beke and Iglo have the lowest percentages of Nutri-Score D-E products, at 2.4% and 0.4%.

These findings highlight significant variability in product marketing restrictions and nutritional quality across different manufacturers.

RESULTS

Commitments versus performance

The association between performance metrics and the BIA-Obesity scores for the commitments made within the corresponding BIA-Obesity domains is illustrated in the Figure 10. 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.

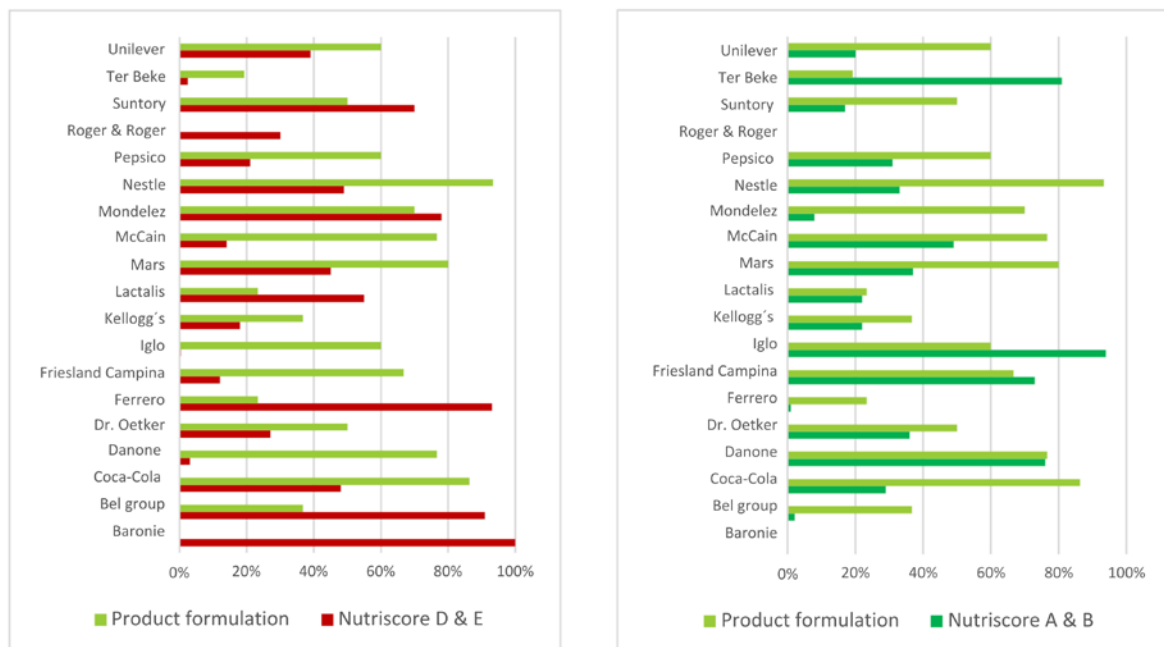


Figure 10. The percentage of products with Nutri-Score D or E (right) and Nutri-Score A or B (left) within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product formulation'. Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2023).

The comparison between Nutri-Score classifications and commitments to product reformulation reveals interesting insights into the efforts of various companies. Iglo stands out with a high proportion of Nutri-Score A & B products (94%) and a strong commitment to product formulation (60%). Similarly, Danone exhibits a high Nutri-Score A & B percentage (76%) alongside a significant commitment to product formulation (77%). Conversely, Baronie has 0% Nutri-Score A & B products, but also lacks any commitment to product reformulation, indicating no efforts towards healthier product offerings.

RESULTS

Companies like Mondelez and Nestlé show a balanced approach, with commitments to product formulation (70% and 93%, respectively) and moderate Nutri-Score A & B percentages (7.9% and 33%). On the other hand, Ferrero shows a significant discrepancy, with 93% of products scoring D & E, and only 23% commitment to product reformulation. These contrasts highlight the varying levels of commitment and success in improving product health profiles across different manufacturers.

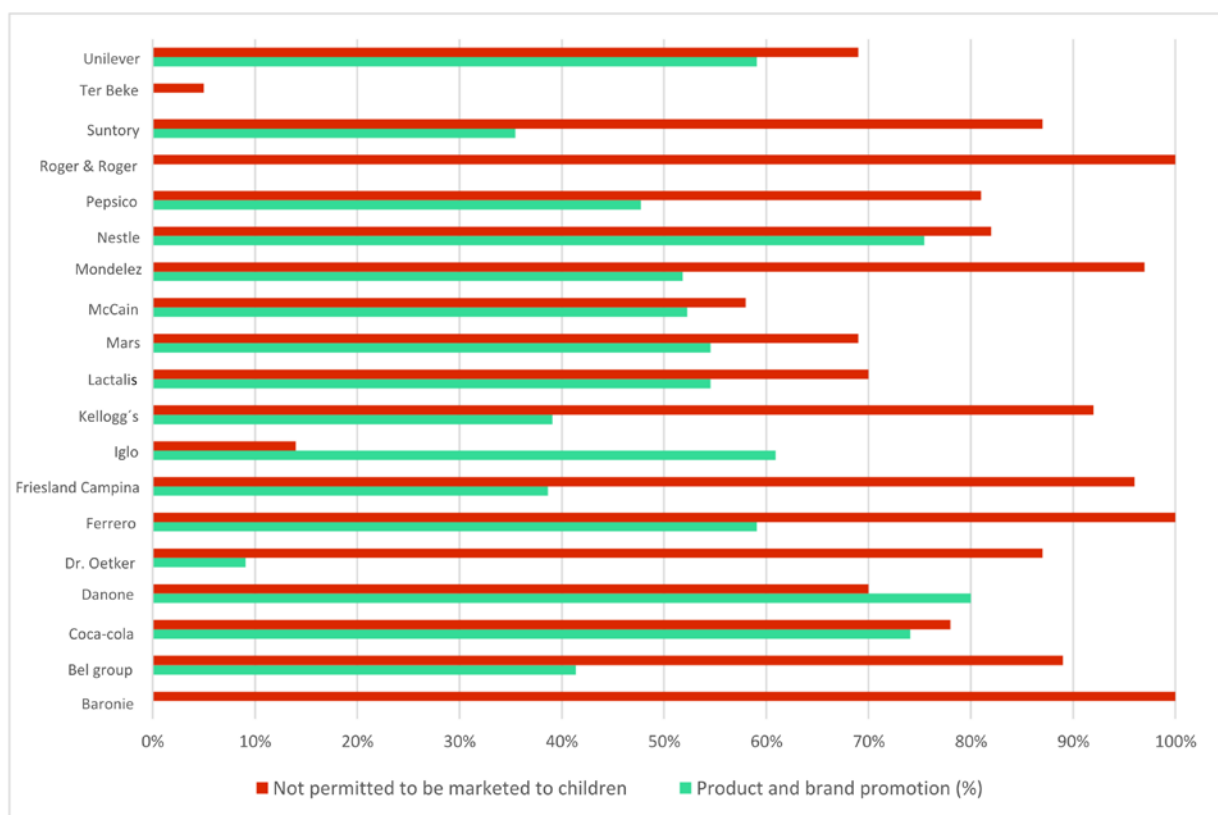


Figure 11. The percentage of products not-permitted to be marketed to children within the portfolios of the selected packaged food and non-alcoholic beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product and brand promotion'. (Belgium, 2023/2024).

RESULTS

The Figure 11. Shows a distinct variations in companies' product and brand promotion commitments and the proportion of products that are not permitted for child marketing. Companies like Ferrero, with a 60% score in product and brand promotion, still have 100% of their products restricted from marketing to children, highlighting a significant gap between their promotion efforts and product healthfulness. This indicates that despite Ferrero's moderate commitment to promoting healthier options, their portfolio remains fully unsuitable for child marketing according to WHO standards.

On the other hand, Baronie and Roger & Roger have both no brand promotion commitments (0%) and all their products (100%) are not permitted to be marketed to children, suggesting minimal investment in healthier product promotion. This complete restriction aligns with their lack of commitments, as neither company has public initiatives to improve the healthfulness of their products for children. Other companies like Danone and Coca-Cola display high promotion commitment scores (80% and 74%, respectively) yet also have a substantial portion of products (70% and 78%) restricted from child marketing. On the other hand, Ter Beke/ What's cooking have no promotion commitments (0%), but only 5% of their products are classified as unsuitable for marketing to children. This inconsistency across brands points to a mixed approach within the industry, where some companies are more proactive in brand promotion while still offering large portfolios of products deemed unsuitable for children, underscoring the need for clearer alignment between marketing commitments and product health standards for young consumers.

RESULTS

The table 10. ranks various companies based on their performance in promoting healthier food options and reducing obesity-related risks. The ranking is determined by the BIA-Obesity score, which evaluates the companies' overall commitment to addressing obesity through their product portfolios and marketing practices. The table also includes additional metrics: the percentage of products with Nutri-Score A (indicating healthier options) and Nutri-Score E (indicating less healthy options), the percentage of products permitted to be marketed to children (as per WHO guidelines), and the percentage of products that are not ultra-processed (according to the NOVA classification). This comprehensive assessment provides an overview of how well each company is performing in creating a healthier food environment.

Table 10. The ranking of companies (1=best; 21=worst) according to the BIA-Obesity score, the proportion of products with Nutri-Score A and Nutri-Score E, the percentage of products permitted to be marketed to children and the percentage of non-ultra-processed food products. (Belgium, 2023).

Company	BIA-Obesity Score	% of products with Nutri-Score A	% of products with Nutri-Score E	% of products permitted to be marketed to children	% of products that are not ultra-processed
Danone	1	3	1-6	6	7
Nestle	2	4	13	10	6
McCain	3	2	1-6	3	5
Coca Cola	4	13	14	8	8
Mars	5	7	15	4	9
PepsiCo	6	8	7	9	11
Iglo	7	1	1-6	2	4
Mondelēz	8	14	16	16	13
Unilever	9	10	10	5	10
Royal Friesland Campina	10	5	8	15	2
Kellogg's	11	15	1-6	14	16
Ferrero	12	16-19	18	17-19	17
Suntory	13	16-19	17	12	15
Dr.Oetker	14	11	11	11	12
Bel group	15	12	12	13	3
Ter Beke/ What's cooking?	16	6	1-6	1	18-19
Lactalis	17	9	9	7	1
Monde Nissin*	18	/	/	/	/
Casa Tarradellas*	19	/	/	/	/
Baronie	20	16-19	19	17-19	14
Roger & Roger	21	16-19	1-6	17-19	18-19

*No products available for these companies in the Nutritrack branded food composition database 2023

RESULTS



Areas of strength across the sector

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

Incorporating nutrition and health into the overarching corporate strategy to some extent.

Committing to the Belgian Pledge.

Committing to implement the Nutri-Score nutrition labelling system on-pack.



RESULTS

Key recommendations for packaged food and non-alcoholic beverage manufacturers

Corporate population nutrition strategy

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

Product formulation

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

Product labelling

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

Product and brand promotion

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

Product accessibility

1. Support evidence-informed government policies such as a tax on sugar-sweetened beverages
2. Make a commitment to increase the proportion of healthy food products in the overall company portfolio
3. Publish a specific commitment addressing the price/affordability of healthier products relative to less healthy products

Relationships with other organizations

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

RESULTS

Quick service restaurants



Commitments

Two of the Quick Service Restaurants actively participated in this study, while we did not receive any rejection, we did not receive feedback from the other four companies. The best performing company, McDonald's, had an overall score of 32% while the worst performing company Lunch garden had an overall score of 2%. The data shows that while some QSRs like McDonald's and Quick are showing improvements in certain areas such as corporate nutrition strategy and product formulation, there is a general lack of comprehensive action across all domains, especially in product accessibility and promotion. The median overall score for QSRs is 15%, indicating room for substantial improvement in addressing obesity and nutrition issues.

RESULTS

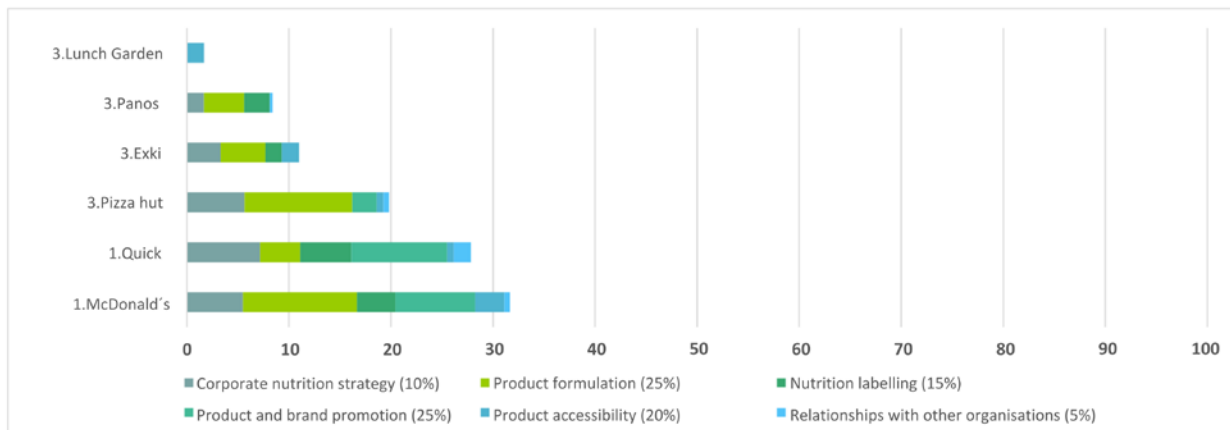


Figure 12. Overall result of BIA-Obesity 2023 for Quick Service Restaurants.

Group 1: Full engagement with the process; Group 2: Accepted participation, but contributions not received in time; Group 3: Due to Lack of contact, the assessment of commitments was based on publicly available information only .

The BIA-Obesity assessment for fast food companies revealed significant variability in their commitments to addressing nutrition and obesity-related challenges. The best-performing domain was 'Corporate Nutrition Strategy,' with a median score of 44%, while the weakest domains were 'Product and Brand Promotion' and 'Relationships with Other Organizations,' with the median score 5% and 6% respectively.

Among the six companies evaluated, only McDonald's and Quick actively participated in the study and provided feedback, while the other four companies declined or did not respond to requests to join. Lunch Garden, in particular, had no publicly available commitments in nearly any domain, and efforts to confirm collected data with the company were unsuccessful.

RESULTS

Table 11. Scores of quick service restaurants by BIA-Obesity domain.

	Weighting (%) in overall score	Median score (%)	Range of scores (%)	Mean [SD] salt content (g/100g)
STRAT: Corporate population nutrition strategy	10	44	0-72	Quick 72%
FORM: Product formulation	25	17	0-45	McDonald's
LABEL: Nutrition labelling	15	14	0-33	Quick 33%
PROMO: Product and brand promotion	25	5	0-38	Quick 38%
ACCESS: Product accessibility	20	6	0-14	McDonald's
RELAT: Relationships with other organizations	5	8	0-33	Quick 33%
OVERALL BIA-Obesity score	100	15	2-32	McDonald's 32%

The table 10. shows that Quick excels in the corporate population nutrition strategy domain with the highest score of 72%, while McDonald's leads in product formulation at 45%. In the nutrition labeling domain, Quick achieves the highest score of 33%. Both Quick and McDonald's perform well in product and brand promotion, scoring 32% and 31%, respectively. McDonald's also leads in product accessibility with a score of 14%. While Quick has the highest score in relationship with other organizations with the score of 33% , both McDonald's and Pizza Hut follow with the score of 11%.

The overall BIA-Obesity scores for quick service restaurants range from 2% to 32%, with McDonald's achieving the highest overall score of 32%. The results indicate that Quick Service Restaurants scored below 50% in most domains, reflecting varied levels of commitment and effectiveness among these establishments in addressing nutrition and obesity-related challenges.

RESULTS

Performance

According to the Locatus 2022 data, for all five quick service restaurants, more than 50% of their outlets in at least one of the regions (Flanders, Wallonia, Brussels) were located within 500m road network distance of primary schools. The overall percentage increase in the number of quick-service restaurants (QSRs) across Belgium from 2018 to 2022, is given in Table 12 with specific data for their presence around schools. Among the listed chains, EXKi experienced the highest growth rate (121.1%), followed by Pizza Hut including Pizza hut delivery (55.9%) and McDonald's (53.6%). Panos, despite a lower growth rate of 30.2%, remains the chain with the most outlets (119 in 2022). The data highlights a significant overall growth trend in QSR presence, particularly near schools, reflecting the increasing accessibility of fast food in Belgium.

Table 12. Location of Quick Service Restaurants from primary and secondary schools.

	Brussels		Wallonia		Flanders		Total outlets 2018 BE	Total outlets 2022 BE
	N	%	N	%	N	%		
Panos	12	66,7	5	41,7	62	69,7	106	119
McDonald's	4	44,4	6	15,8	20	33,9	56	104
Quick	9	52,9	13	38,2	9	29,0	76	76
EXKi	13	72,2	9	75,0	2	28,6	19	36
Pizza Hut	10	76,9	12	85,7	19	67,9	0	51
Pizza Hut	1	25,0	4	25,0	16	40,0	68	57

	Brussels		Wallonia		Flanders		Total outlets 2018 BE	Total outlets 2022 BE
	N	%	N	%	N	%	106	119
Panos	12	66,7	7	58,3	65	73,0	56	104
McDonald's	4	44,4	7	18,4	15	25,4	76	76
Quick	8	47,1	12	35,3	6	19,4	19	36
EXKi	8	44,4	7	58,3	3	42,9	0	51
Pizza Hut	8	61,5	11	78,6	17	60,7	68	57
Pizza Hut	1	25,0	5	31,3	11	27,5	106	119

RESULTS



Areas of strength across the sector

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

Disclosure of philanthropic funding and support for active lifestyle programs on the websites for most companies

Comprehensive nutrition information of products provided on the national websites for most companies, although sometimes per serve instead of per 100g

Commitment to improve the healthiness of oils used in frying foods for one company

Commitment to not provide free refills for sugar sweetened beverages for one company



RESULTS

Key recommendations for quick service restaurants

Corporate population nutrition strategy

1. Priorities 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.
2. Adopt an official nutrient profiling system (e.g. Nutri-Score) to guide reformulation efforts.

Product labeling

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

Product accessibility

1. Support evidence-informed government policies such as a tax on sugar-sweetened beverages
2. Commit to not provide free refills for sugary drinks.
3. Commit to reduce the availability of unhealthy products and increase the availability of healthy products in meal portfolio.

Relationships with other organizations

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

RESULTS

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 (51%) was aligned with the individual scores of leading companies such as Delhaize (65%) and Colruyt (52%). The best-performing domain for supermarkets was 'corporate nutrition strategy' with a median score of 87%. The worst-performing domain was 'product accessibility' with a median score of 11%. One company, Carrefour did not have any commitments for the domain 'product accessibility'. All five supermarkets engaged in the BIA-Obesity process.



RESULTS

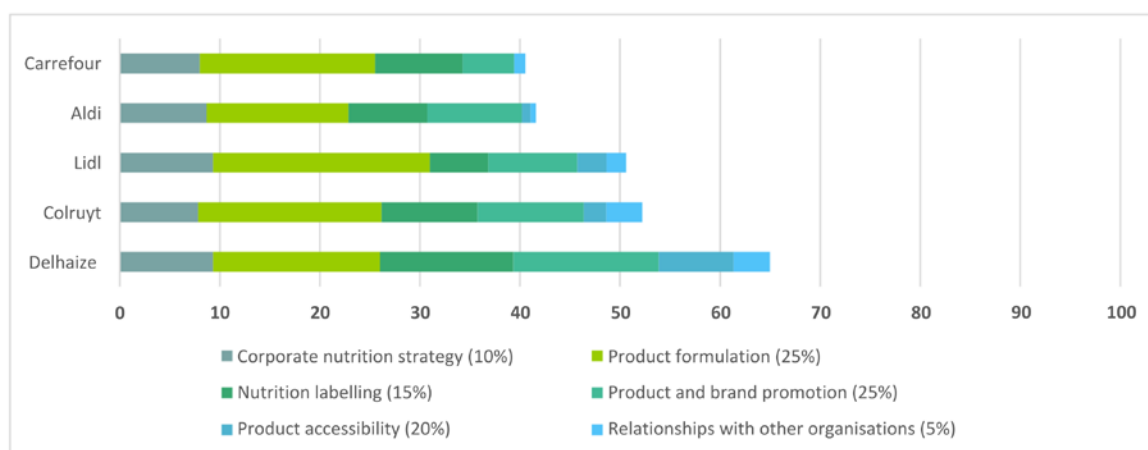


Figure 13. Overall result of BIA-Obesity 2023 for supermarkets.

Table 13. Scores of supermarkets by BIA-Obesity domain.

	Weighting (%) in overall score	Median score (%)	Range of scores (%)	Highest score
STRAT: Corporate population nutrition strategy	10	87	80-93	Delhaize/ Lidl
FORM: Product formulation	25	70	57-87	Lidl 87%
LABEL: Nutrition labelling	15	58	39-89	Delhaize 89%
PROMO: Product and brand promotion	25	38	21-58	Delhaize 58%
ACCESS: Product accessibility	20	11	0-38	Delhaize 38%
RELAT: Relationships with other organizations	5	39	11-72	Delhaize 72%
OVERALL BIA-Obesity score	100	50	40-65	Delhaize 65%

RESULTS

The median overall BIA-Obesity score for supermarkets is 51%, with Delhaize achieving the highest overall score at 65%. The best-performing domain is 'corporate population nutrition strategy', with a median score of 87% and Delhaize and Lidl leading at 93%. The domain of 'product formulation' has a median score of 70%, with Lidl attaining the highest score of 87%, followed by Colruyt with 73%. In the 'nutrition labelling' domain, the median score is 58%, and Delhaize again achieves the highest score at 89%.

The 'product and brand promotion' domain has a median score of 38%, with Delhaize scoring the highest at 58%, followed by Colruyt at 43%. The 'product accessibility' domain is the lowest performing, with a median score of 11% and Delhaize obtaining the highest score of 38%. The 'relationships with other organizations' domain shows a median score of 39%, with Delhaize leading at 72%. Overall, Delhaize demonstrates the best performance across multiple domains through various strategies and commitments.



RESULTS

Performance

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

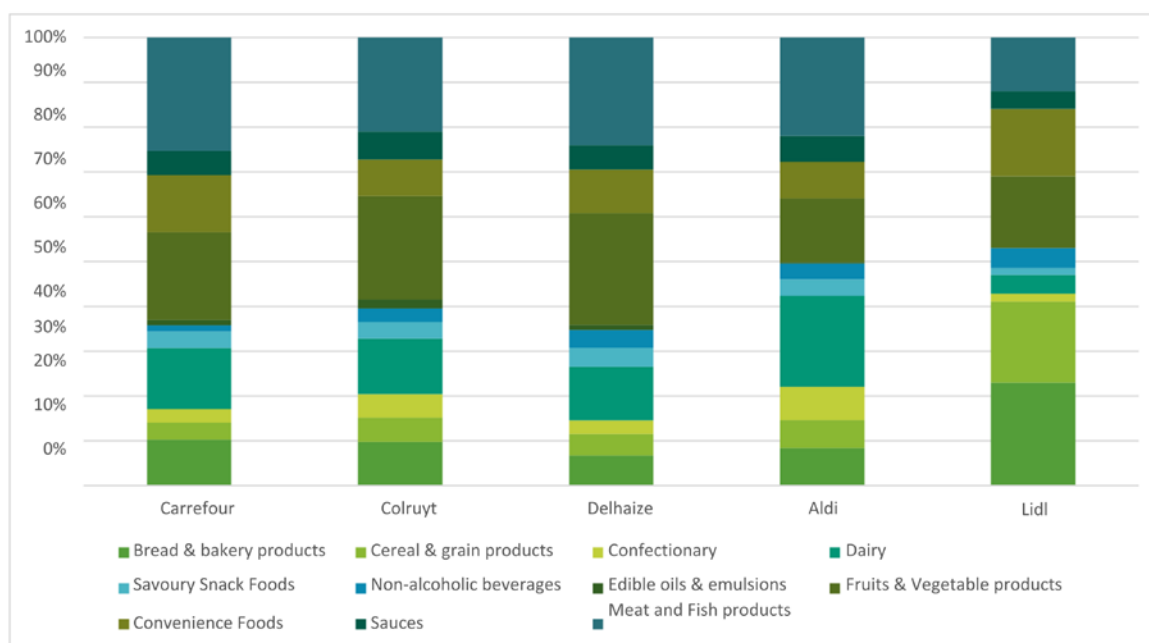


Figure 14. An overview of the proportion of products per food category for the selected supermarkets (Nutri-track Belgium, 2023).

Table 14. presents a ranking of supermarkets based on the healthiness of their product portfolios within different food categories. The assessment covers multiple nutrients of concern, including energy content, sugar, saturated fat, and salt. For each product category, the table identifies the supermarket with the healthiest and least healthy offerings. This evaluation provides insights into which supermarkets are leading in offering healthier food options and which ones have room for improvement. The analysis is part of a broader effort to track and promote better nutrition and healthier eating habits among consumers.

RESULTS

Table 14. The best (top) and worst (bottom) performing supermarkets per product category and per nutrient of concern (Nutri-track Belgium, 2023).

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 and products	Healthiest	Carrefour 1,542.8 (491.2)	Lidl, Delhaize 19.4 (16.4)	Carrefour 6.6 (5.8)	Aldi 0.6 (0.3)
	Least healthy	Aldi 1,926.6 (228.4)	Aldi 30.3 (13.1)	Aldi 9.5 (5.6)	Carrefour 1.2 (3.1)
Cereal & grain	Healthiest	Delhaize 1,195.6 (473.5)	Delhaize 4.8 (7.0)	Delhaize 1.0 (1.3)	Colruyt 0.3 (0.6) Delhaize 0.3 (0.5) Lidl 0.3 (0.3)
	Least healthy	Lidl 1,647.5 (169.1)	Lidl 16.5 (11.4)	Lidl 2.3 (2.4)	Carrefour 0.4 (0.5)
Confectionary	Healthiest	Carrefour 1,818.4 (512.2)	Aldi 34.5 (21.9)	Carrefour 9.4 (9.5)	Carrefour , Delhaize 0.1 (0.2)
	Least healthy	Lidl 2,232.5 (218.6)	Delhaize 51.9 (11.7)	Lidl 16.6 (9.2)	Lidl 0.6 (1.0)
Convenience Foods	Healthiest	Aldi 541.9 (238.4)	Aldi 2.5 (1.6) Carrefour 2.5 (1.9) Colruyt 2.5 (1.8)	Aldi 1.9 (1.6)	Aldi 0.9 (0.3), Carrefour 0.9 (0.7), Colruyt 0.9 (0.4) Delhaize, 0.9 (0.6) Lidl 0.9 (0.4)
	Least healthy	Lidl 749.6 (306.6)	Lidl 3.4 (5.8)	Lidl 2.8 (2.2)	N/A ¹
Dairy	Healthiest	Aldi 674.6 (456.0)	Carrefour 6.7 (8.9)	Aldi 6.3 (7.1) Lidl 6.3 (4.3)	Aldi 6.3 (7.1) Lidl 6.3 (4.3)
	Least healthy	Carrefour 982.9 (529.3)	Lidl 16.4 (9.4)	Carrefour 11.2 (8.2)	Carrefour 11.2 (8.2)
Fruits & Vegetable products	Healthiest	Lidl 245.6 (164.4)	Lidl 3.4 (4.1)	Lidl 0.3 (0.6)	Lidl 0.3 (0.6)
	Least healthy	Aldi 722.0 (848.1)	Carrefour 10.4 (17.3)	Aldi 1.7 (2.9)	Aldi 1.7 (2.9)
Meat & products	Healthiest	Carrefour 866.1 (460.1)	Carrefour 0.8 (1.3)	Delhaize 4.5 (3.9)	Delhaize 1.7
	Least healthy	Colruyt 1,015.6 (441.8)	Lidl 3.0 (5.1)	Colruyt 5.8 (4.6)	Carrefour , Delhaize 1.6
Non-alcoholic beverages	Healthiest	Delhaize 98.2 (168.6)	Delhaize 4.0 (4.5)	Lidl 0.0 (0.1)	Colruyt 2.4 (1.4)
	Least healthy	Colruyt 280.8 (453.4)	Aldi 12.5 (16.6)	Colruyt 0.7 (2.4)	N/A
Sauce	Healthiest	Carrefour 1,039.6 (830.1)	Delhaize 7.6 (13.1)	Carrefour 2.5 (2.6)	N/A
	Least healthy	Lidl 1,616.6 (721.5)	Lidl 19.2 (23.7)	Lidl 4.0 (2.8)	Lidl 0.9 (0.6)
Savoury Snack Foods	Healthiest	Colruyt 1,809.1 (617.2)	Lidl 1.8 (1.9)	Lidl 2.5 (0.1)	Carrefour 2.8 (7.5)
	Least healthy	Lidl 2,182.4 (23.8)	Carrefour 5.9 (12.2)	Carrefour 5.8 (7.7)	Lidl 1.3 (0.5) Delhaize 1.3 (0.3) Colruyt 1.8 (0.7)

1. N/A= Not applicable

RESULTS

Figure 15. Show the overall results for proportion of Nutri-score A, B, C, D and E products in selected retailers. The supermarket with the highest proportion of Nutri-Score A and B products was Delhaize with 34% and 22%, while the company with the highest proportion of Nutri-Score E products was Aldi (9%) followed by Colruyt (8%).

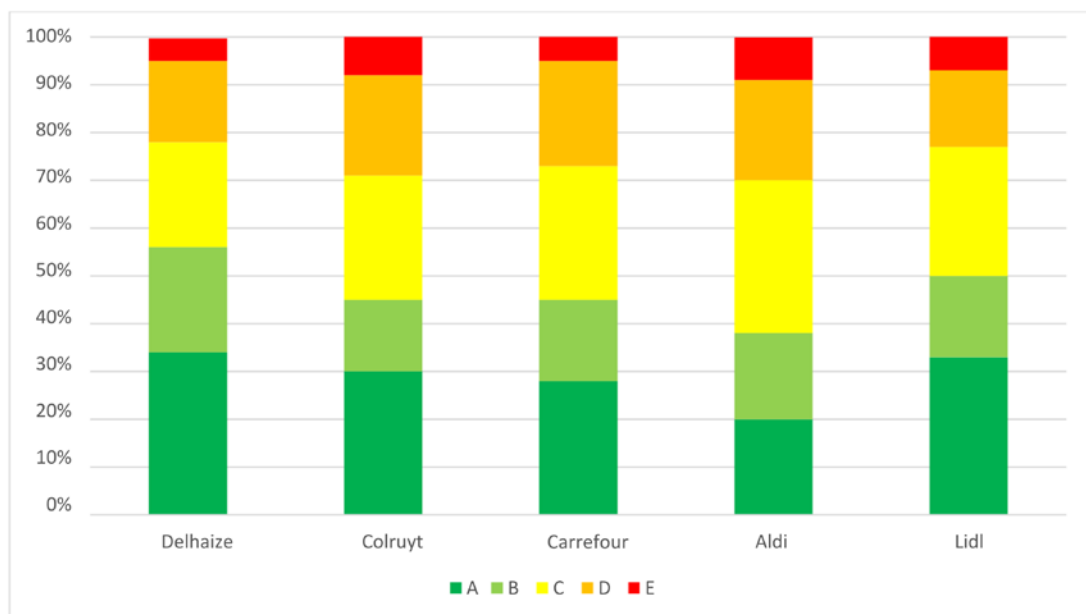


Figure 15. The proportion of products with Nutri-Score A, B, C, D, E and the median Nutri-Score within the portfolios of the selected supermarkets (Nutri-track Belgium, 2018).

The supermarket portfolios were also analysed in relation to the proportion of ultra-processed foods and products permitted to be marketed to children. The results show that the portfolio of Delhaize had the lowest proportion of ultra-processed products (41%) and highest proportion of products that are permitted to be marketed to children (50%). Aldi had the highest proportion of ultra-processed products (61%) and products not permitted to be marketed to children (69%), followed by Lidl with 63% of ultra-processed food and 65% of products that are not permitted to be marketed to children respectively.

RESULTS

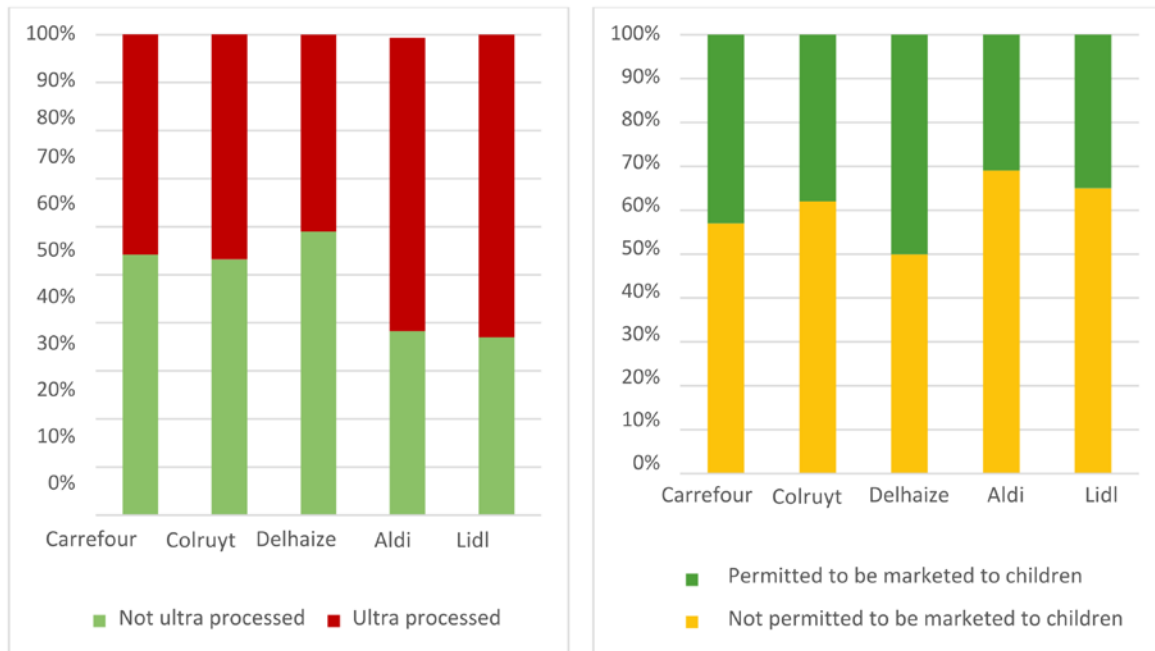


Figure 16. The proportion of (non-) ultra-processed products (left) and the proportion of products (not-) permitted to be marketed to children (right) within portfolios of selected supermarkets (Nutri-track Belgium, 2023).

Overall, the average ratio of healthy/unhealthy foods in supermarkets in Flanders is 0.36 meaning that for every 10m of shelf length of unhealthy foods there is 3.6m of healthy foods. There is large and significant variation in ratio's across supermarket chains. The discounter Aldi is on average having the highest ratio of healthy versus unhealthy food linear shelf length while Carrefour is having the lowest average ratio. Corrected for size of the supermarket, Carrefour and Colruyt offer the highest total cumulative linear shelf length for fresh and frozen fruits and vegetables, while this is the lowest for the discounter Aldi, while similarly for unhealthy foods, Carrefour is offering the highest total cumulative linear shelf length and Aldi the lowest.

RESULTS

Overall, the average ratio of healthy/unhealthy foods in supermarkets in Flanders is 0.36 meaning that for every 10m of shelf length of unhealthy foods there is 3.6m of healthy foods. There is large and significant variation in ratio's across supermarket chains. The discounter Aldi is on average having the highest ratio of healthy versus unhealthy food linear shelf length while Carrefour is having the lowest average ratio. Corrected for size of the supermarket, Carrefour and Colruyt offer the highest total cumulative linear shelf length for fresh and frozen fruits and vegetables, while this is the lowest for the discounter Aldi, while similarly for unhealthy foods, Carrefour is offering the highest total cumulative linear shelf length and Aldi the lowest.

Table 15. The ratio of cumulative linear shelf length for healthy/unhealthy foods in supermarkets in Flanders

Supermarket	N	Shelf length Ratio healthy/ unhealthy foods			cm / opp in m ² for healthy foods			cm / opp in m ² for unhealthy foods		
		mean	L 95%CI	U 95% CL	mean	L 95% CL	U 95% CL	mean	L 95% CL	U 95% CL
Aldi	14	0.45	0.38	0.52	8.4	7.4	9.3	19.5	16.3	22.7
Carrefour	9	0.25	0.22	0.28	10.1	8.6	11.6	41.0	35.0	46.9
Colruyt	11	0.39	0.34	0.44	11.6	9.7	13.4	29.9	26.0	33.8
Delhaize	9	0.27	0.24	0.31	9.2	7.2	11.2	34.4	26.1	42.7
Lidl	12	0.39	0.32	0.45	9.6	8.5	10.8	25.3	23.2	27.4
Total	55	0.36	0.33	0.39	9.7	9.1	10.3	28.8	26.1	31.5
Total-low SES	33	0.35	0.31	0.38	9.5	8.9	10.2	29.8	26.2	33.4
Total-medium SES	12	0.37	0.31	0.43	10.9	8.8	13.0	30.7	34.5	36.8
Total-high SES	8	0.43	0.30	0.56	8.9	6.8	11.0	22.3	15.8	28.8

RESULTS

It can be observed that the shelf length ratio healthy/unhealthy foods is lowest in the high prominence areas such as check-outs and front end-of aisle endcaps while it is highest in the low prominence areas in the supermarket (e.g. along the edge). The differences are substantial. There is also substantial variation across supermarket chains with Colruyt having the highest ratio in the high prominence areas, probably due to the fact that they have a commitment not to have junk food at the check-outs, while Delhaize has the highest ratio in the low prominence areas.

Table 16. The cumulative linear shelf length ratio for healthy/unhealthy foods according to different supermarket prominence areas

Prominence	Supermarket	mean	L 95%CI	U 95%CI
high	Aldi	0.02	-0.01	0.05
	Carrefour	0.02	-0.02	0.05
	Colruyt	0.13	0.04	0.23
	Delhaize	0.02	-0.03	0.08
	Lidl	0.04	0.00	0.08
	Total	0.05	0.02	0.07
low	Aldi	3.06	-0.09	6.22
	Carrefour	0.79	0.10	1.49
	Colruyt	3.59	1.41	5.77
	Delhaize	8.85	-1.15	18.85
	Lidl	0.57	0.34	0.79
	Total	3.20	1.44	4.96
medium	Aldi	0.41	0.35	0.47
	Carrefour	0.23	0.19	0.28
	Colruyt	0.16	0.12	0.20
	Delhaize	0.23	0.17	0.29
	Lidl	0.47	0.38	0.57
	Total	0.32	0.27	0.36

RESULTS

Colruyt was the supermarket with the lowest proportion of ultra-processed foods at checkouts, which is aligned with the commitments they have not to place any junk food at the check outs. Delhaize and Carrefour had the highest proportion of ultra-processed foods at the check-outs.

Table 17. Overview of types of foods and brands available at the high prominent locations across supermarkets in Flanders by supermarket brand, 2022

Supermarket locations	Supermarket chain	% food	% ultra processed food	% alcohol
Endcaps front	Aldi (N=654)	46.5%	30.7%	27.7%
	Carrefour (N=3540)	48.8%	26.4%	9.3%
	Colruyt (N=2130)	35.7%	26.2%	3.8%
	Delhaize (N=3126)	46.1%	33.9%	13.3%
	Lidl (N=683)	68.5%	49.8%	11.7%
	Aldi (N=1425)	84.9%	82.6%	0.6%
	Carrefour (N=1579)	90.3%	88.0%	0.7%
	Colruyt (N=620)	1.1%	1.0%	0.3%
	Delhaize (N=1422)	90.9%	88.6%	1.9%
	Lidl (N=2088)	86.5%	84.0%	3.1%
Check-outs	Aldi (N=1425)	84.9%	82.6%	0.6%
	Carrefour (N=1579)	90.3%	88.0%	0.7%
	Colruyt (N=620)	1.1%	1.0%	0.3%
	Delhaize (N=1422)	90.9%	88.6%	1.9%
	Lidl (N=2088)	86.5%	84.0%	3.1%

Previously it was found that promotions in supermarket flyers were mostly for ultra-processed foods. Nevertheless, among all supermarkets, the promotions on the cover of the flyers tended to be healthier with a higher percentage of fresh fruits and vegetables and a lower percentage of ultra-processed foods. Considerable variation was observed between the different supermarkets. Across the entire circular, as well as on the front cover, Aldi most frequently promoted fresh fruits and vegetables while this was least common in the flyers of Colruyt.¹¹

¹¹ <https://pubmed.ncbi.nlm.nih.gov/34011377/>

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 within company portfolio. Stronger commitments were not related with a better Nutri-Score across the product portfolio.

Supermarkets' commitments made within the BIA-Obesity domain 'Product and brand promotion' were in turn compared with the percentage of products within the company portfolio that were not-permitted to be marketed to children according to the WHO-Model. Stronger commitments were not related with more products within the product portfolio being permitted to be marketed to children, figure 17 and 18.

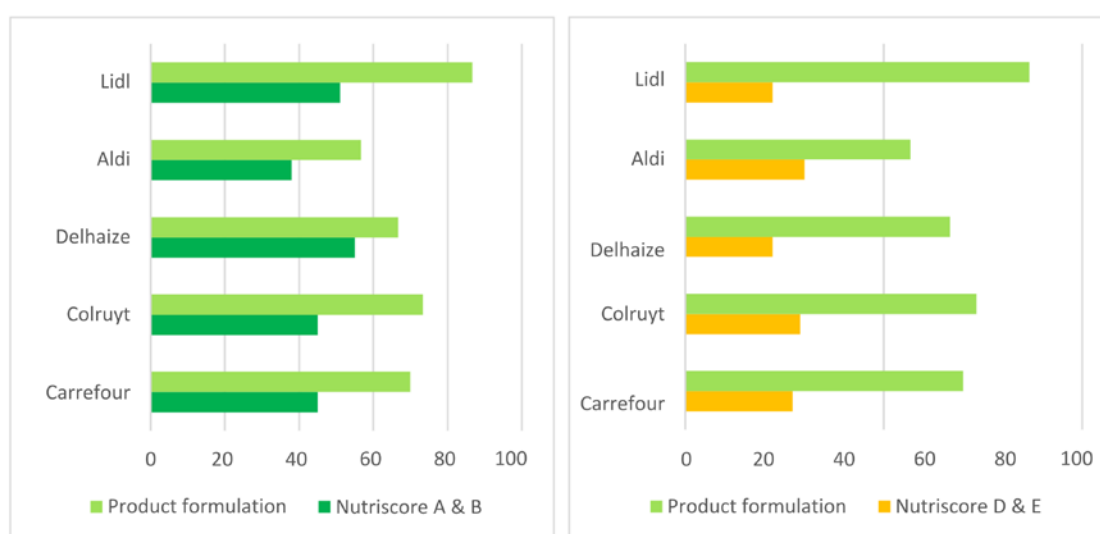


Figure 17. The percentage of products with Nutri-Score D or E (right) and Nutri-Score A or B (left) within portfolios of selected packaged food and non-alcoholic beverage manufacturers compared with the BIA-Obesity scores obtained within the domain 'Product formulation'. Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2023).

RESULTS

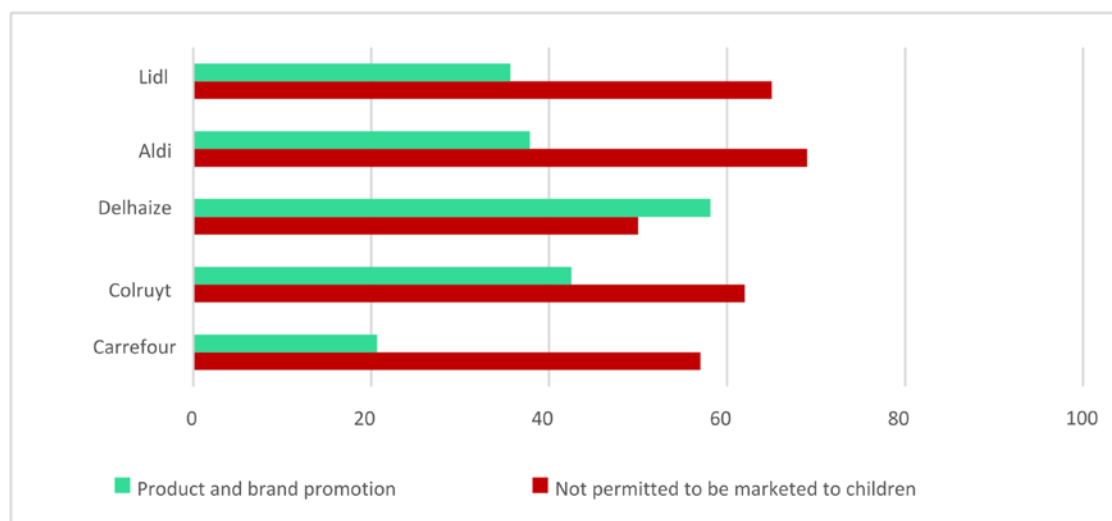


Figure 18. scores obtained within the domain 'Product and brand promotion'. Data are sorted according to the descending BIA-Obesity scores within this domain (Belgium, 2023).

The 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 Figures above, a higher BIA-Obesity score does not necessarily translate into a better ranking according to the performance metrics.

Table 18. The ranking (ranking 1= best, 5=worst) of supermarkets according to the BIA-Obesity score, the proportion of products with Nutri-Score A and Nutri-Score E, the percentage of products permitted to be marketed to children, the percentage of non-ultra-processed food products and the amount of fresh fruits and vegetables promoted within supermarket flyers. (Belgium, 2018).

Rank of the company							
Company	BIA-Obesity Score	% Nutri-Score A products	% Nutri-Score E products	% of products permitted to be marketed to children (WHO)	% Non-ultra-processed food products (NOVA)	Shelf length ratio of healthy versus unhealthy food	% of ultra-processed food at Check-outs
Delhaize	1	1	1	1	1	4	5
Colruyt	2	3	4	3	3	3	1
Lidl	3	2	3	4	4	2	3
Aldi	4	5	5	5	5	1	2
Carrefour	5	4	2	2	2	5	4

RESULTS



Areas of strength across the sector

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

Strong commitment to improving population nutrition on the national website, for one company there is annual reporting against specific objectives and targets

Clear commitment to reformulate private label grocery products with respect to saturated fat, sugar, sodium

Commitment to display the Nutri-Score on all private label grocery products, including online, as well as on the shelf for some retailers



RESULTS

Key recommendations for supermarkets

Corporate population nutrition strategy

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

Product formulation

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

Product labelling

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

Product and brand promotion

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

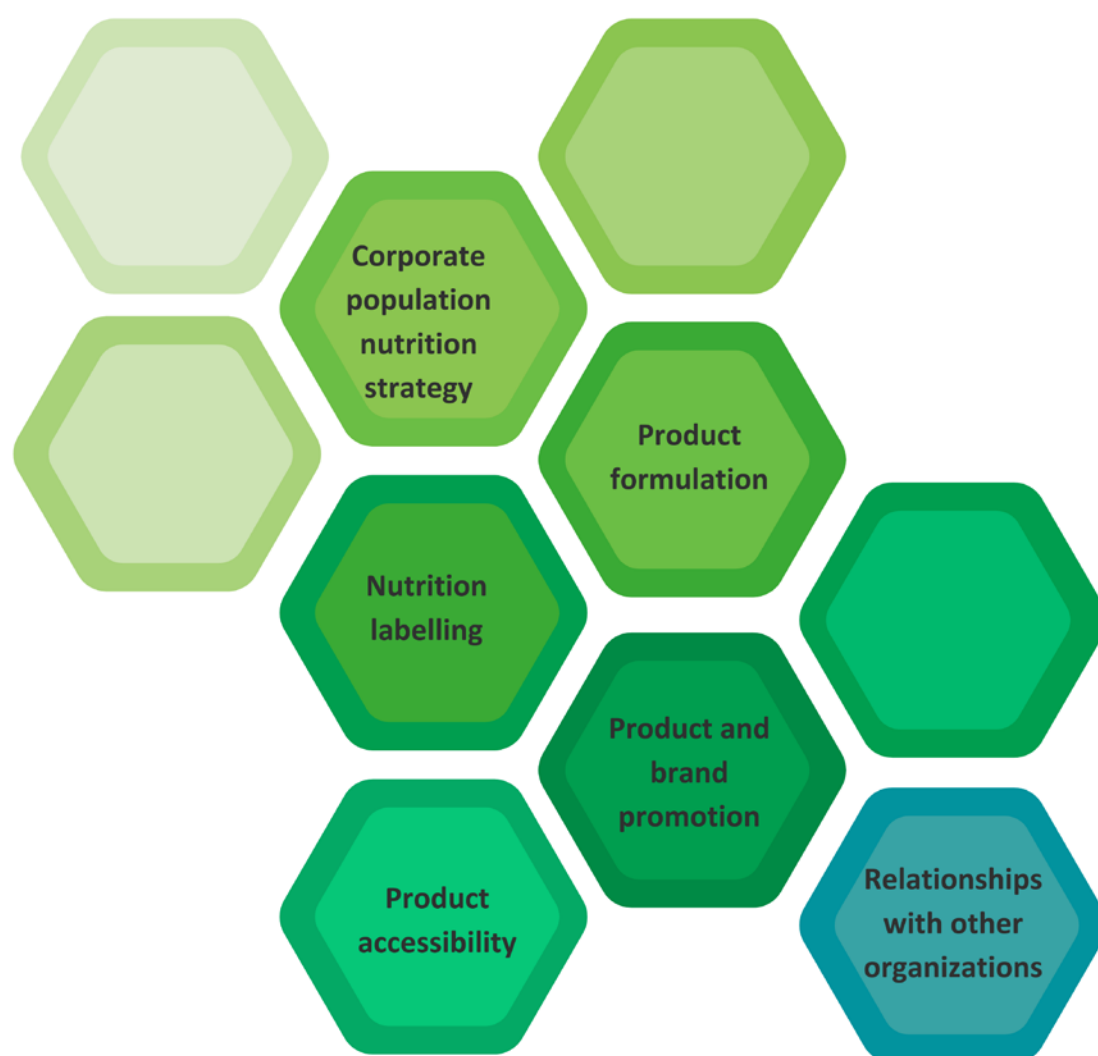
Product accessibility

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

Relationships with other organizations

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

BIA-OBESITY FINDINGS BY DOMAINS



RESULTS

Findings by domain

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

63/100

Key Findings

This is the best scoring BIA-Obesity domain; four companies had no commitments in this domain.

Corporate Nutrition Strategy: The majority of companies have implemented some form of corporate nutrition strategy. However, four companies did not have any corporate population nutrition strategy, while one company (Danone) achieved the maximum score for this BIA-Obesity domain. Among the companies assessed, several regularly publish publicly available national reports, including reporting against objectives and targets. The lowest performing companies made little or no mention of nutrition-related issues.

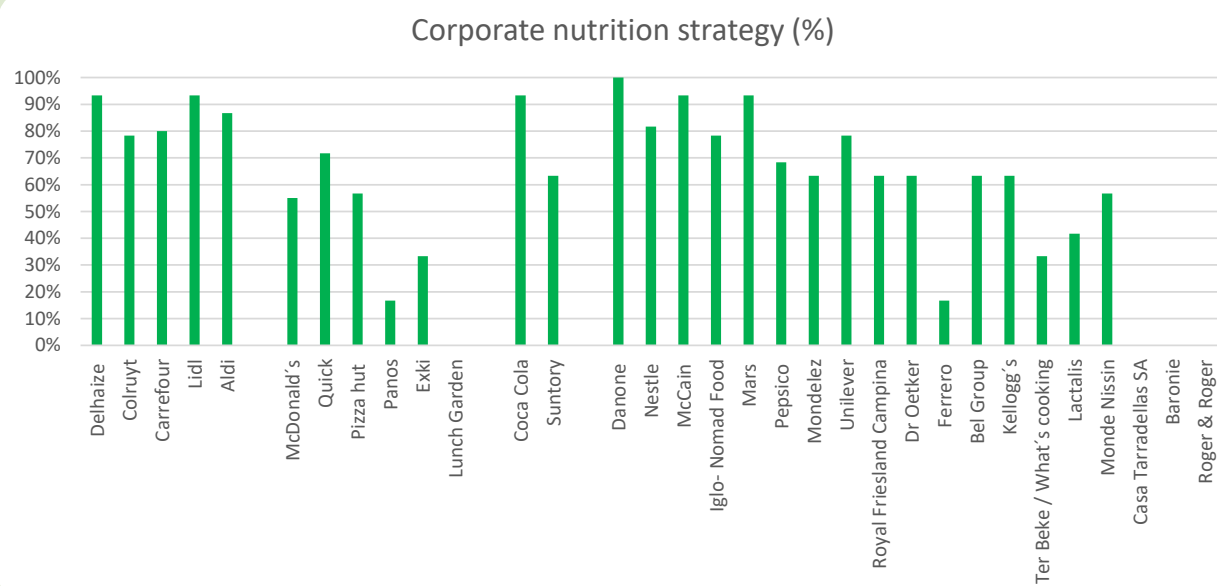
Sector Comparison: Supermarkets (median score 87%) performed significantly better than packaged food and beverage manufacturers (median score 63%) and quick service restaurants (median score 44%) for this domain. This indicates that supermarkets are more proactive in developing and reporting on their corporate nutrition strategies compared to other sectors.

Recognition of National and International Priorities: Several companies recognized both national (e.g., Convention Balanced Diets, Nutri-Score) and international (e.g., United Nations Sustainable Development Goals or the World Health Organization global NCD action plan) priorities within their corporate nutrition strategy. This alignment with broader nutritional goals demonstrates a commitment to improving public health.

Reporting Practices: Certain companies provided annual national reports outlining their advancements towards set goals and objectives. In contrast, some companies offered minimal information on their progress towards these targets. This inconsistency in transparency underscores the necessity for standardized reporting practices within the industry.

Population Nutrition Priority: The majority of companies did not clearly prioritize population nutrition in comparison to environmental and social priorities. This indicates that, although there is some acknowledgment of the significance of nutrition, it frequently takes a back seat to other corporate priorities.

RESULTS



Recommendations for action

Clearer Prioritization: Companies should identify population nutrition as a clearer priority focus area, setting relevant objectives, targets, and appropriate resourcing to support these goals.

Regular Reporting: It is essential for companies to report progress against specific population nutrition targets and objectives on a regular basis. This practice not only demonstrates transparency but also accountability in their commitment to public health.

International Priorities: Companies should refer to international priorities, such as the United Nations Sustainable Development Goals or the World Health Organization global NCD action plan, within their corporate nutrition strategies. Aligning with these priorities can help ensure that their efforts are part of a larger, coordinated approach to improving global nutrition.

Government and International Recommendations: Companies should participate in or implement strategies to adopt relevant recommendations from government-led programs or international bodies. This includes improving the nutritional quality of their product portfolios, adopting health-related labelling of food products (e.g., Nutri-Score), and restricting the marketing of unhealthy foods to children.

By taking these actions, companies can significantly contribute to the improvement of public health through better nutrition, aligning their business practices with global health objectives.

RESULTS

Findings by domain

B. Product formulation

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

50/100

Key Findings

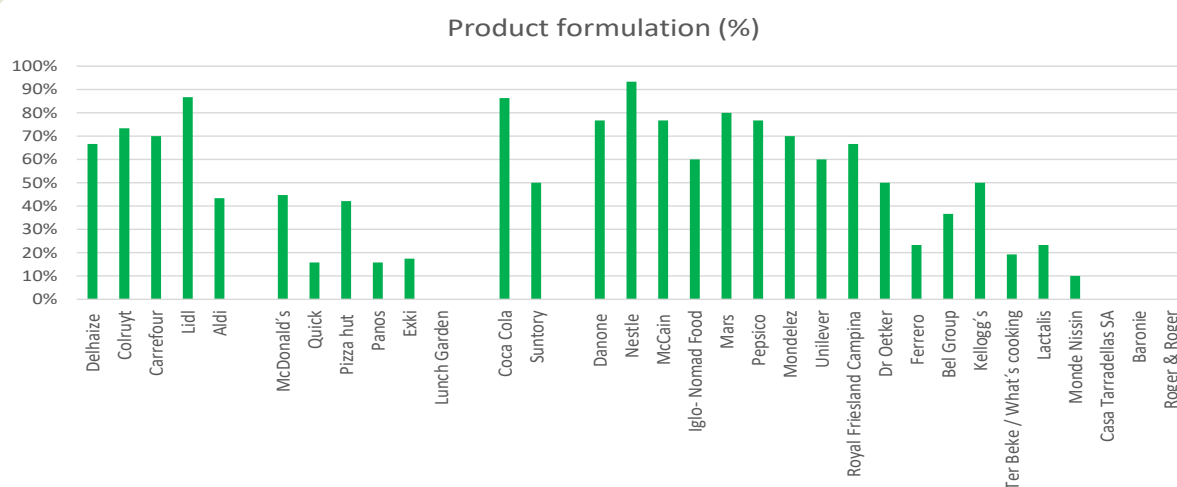
This is the second best scoring BIA-Obesity domain; four companies had no commitments in this domain

No Maximum Scores: No companies obtained the maximum score for this domain. However, the best performing companies, Nestle achieved a high score 93% by committing to reduce salt, saturated fats, sugar, and energy content of their food products.

Nutri-Score Utilization: 9 out of 21 food and non-alcoholic beverage manufacturers and all of five supermarkets already utilized Nutri-Score to guide their reformulation efforts. This demonstrates an ongoing effort to improve product formulation based on recognized nutritional standards.

Targets for Reducing Added Sugar and Sodium: 14¹⁵ out of 21 food and non-alcoholic beverage manufacturers and all supermarkets had targets related to reducing added sugar content. Similarly, 17 out of 21 food and non-alcoholic beverage manufacturers and all supermarkets had targets related to reducing sodium content.

Portion Size Reduction Targets: 14 out of 21 food and non-alcoholic beverage manufacturers and all the five supermarkets had targets for reducing portion sizes where relevant. However, only one out of seven quick service restaurants had such targets, indicating an area for improvement in this sector.



RESULTS

Recommendations for action

- **Develop SMART Targets:** Companies should 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 their portfolio. Routinely reporting on progress in achieving these reformulation targets will enhance transparency and accountability.
- **Portion Size Reduction:** Develop portion size reduction targets for food categories where this is relevant. This can help in managing the overall intake of nutrients of concern and support healthier consumption patterns.
- **Utilize Nutri-Score:** Utilize the Nutri-Score front-of-pack labelling system and nutrient profiling system to guide reformulation efforts. This will not only assist in product development but also provide consumers with clear nutritional information to make healthier choices.

By implementing these recommendations, companies can make significant strides in improving the nutritional quality of their product offerings, contributing positively to public health outcomes.

RESULTS

Findings by domain

C. Nutrition labelling

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

36/100

Key Findings

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

No Maximum Scores: No companies obtained the maximum score for this domain, while one company (Roger & Roger) did not have any commitments for product labelling. This indicates a significant room for improvement across the board.

Sector Comparison: Supermarkets are clearly performing much better within this domain (median score 58%) compared to packaged food and beverage manufacturers (median score 37%) and quick service restaurants (median score 14%). This disparity highlights the leadership of supermarkets in adopting nutrition labelling practices.

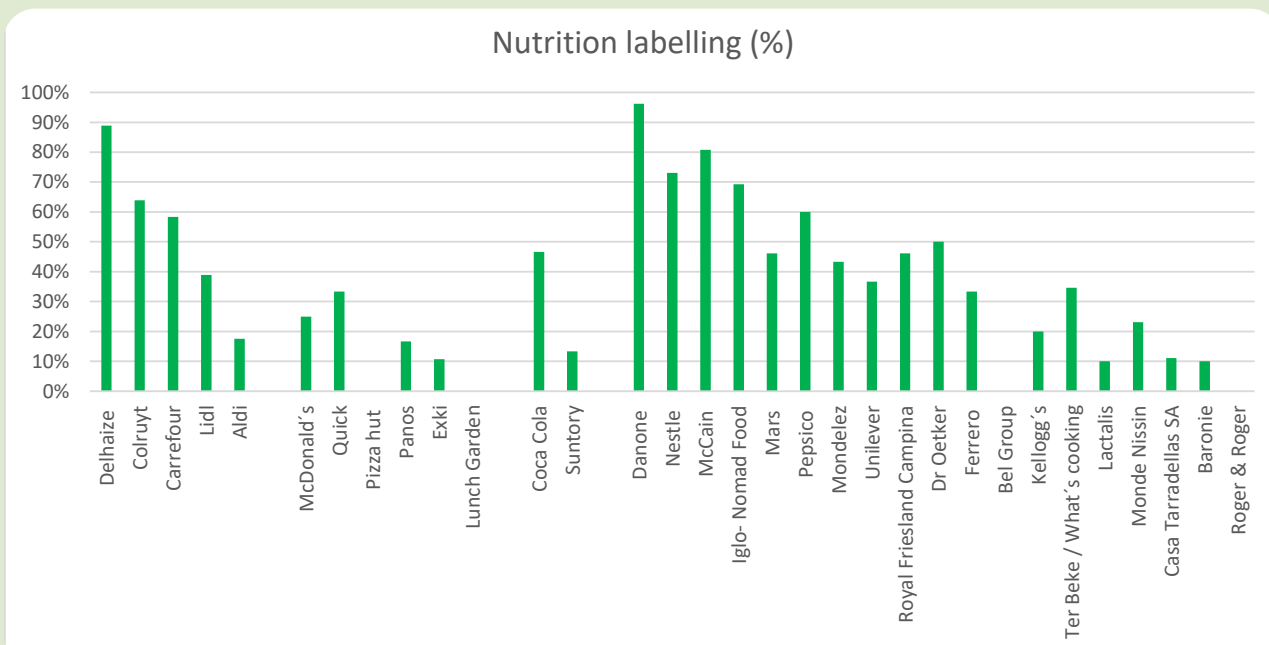
Top Performer: The top performer in this domain, Danone, committed to introducing the government-endorsed Nutri-Score System on their own-brand packaged food products. They also provided both on-shelf and online Nutri-Score information for all products, not just their own-brand products, in-store.

Nutri-Score Implementation: 9 out of 21 packaged food and non-alcoholic beverage manufacturers and all supermarkets committed to implementing the government-endorsed Nutri-Score System on their own-brand products which shows a growing trend towards adopting standardized nutritional labelling.

Quick Service Restaurants: Only 1 out of 6 quick service restaurants provided nutritional information about food and meals online (Lunch Garden has no nutritional information available online). However, none of them committed to labelling their menu boards in-store, which suggests a need for more comprehensive labelling practices in this sector.

Danone's Commitment: Danone, had a public commitment not to display nutrition claims on products that are unhealthy. This is a noteworthy initiative towards ensuring that nutrition claims are not misleading.

RESULTS



Recommendations for action

- **Nutri-Score Implementation:** Companies should commit to implementing the Nutri-Score system across all products, with specific roll-out plans and timelines. This is particularly important for packaged food and beverage manufacturers.
- **Support Mandatory Implementation:** Companies should support the mandatory implementation of the Nutri-Score in the EU region. This will help create a uniform standard for nutritional labelling, benefiting consumers across the region.
- **Calorie Labelling and Shelf Tags:** Quick service restaurants should commit to providing calorie labelling for foods and meals on-site. Supermarkets should implement Nutri-Score shelf tags in-store to provide clear nutritional information at the point of purchase.
- **Nutrition and Health Claims Policy:** Companies should introduce a policy to only make nutrition and health claims (e.g., '99% fat free') on products that are classified as 'healthy' using the Nutri-Score or other independent nutrient profiling scoring criteria. This will help ensure that health claims are accurate and not misleading.

By taking these actions, companies can significantly enhance their nutrition labelling practices, providing better information to consumers and promoting healthier eating choices.

RESULTS

Findings by domain

D. Product and brand promotion

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

38/100

Key Findings

Nine companies did not have publicly available commitments in this domain.

Maximum Scores: None of the companies obtained maximum score in this domain. Danone with 80% was the highest score and 9 companies did not have any commitments in this domain.

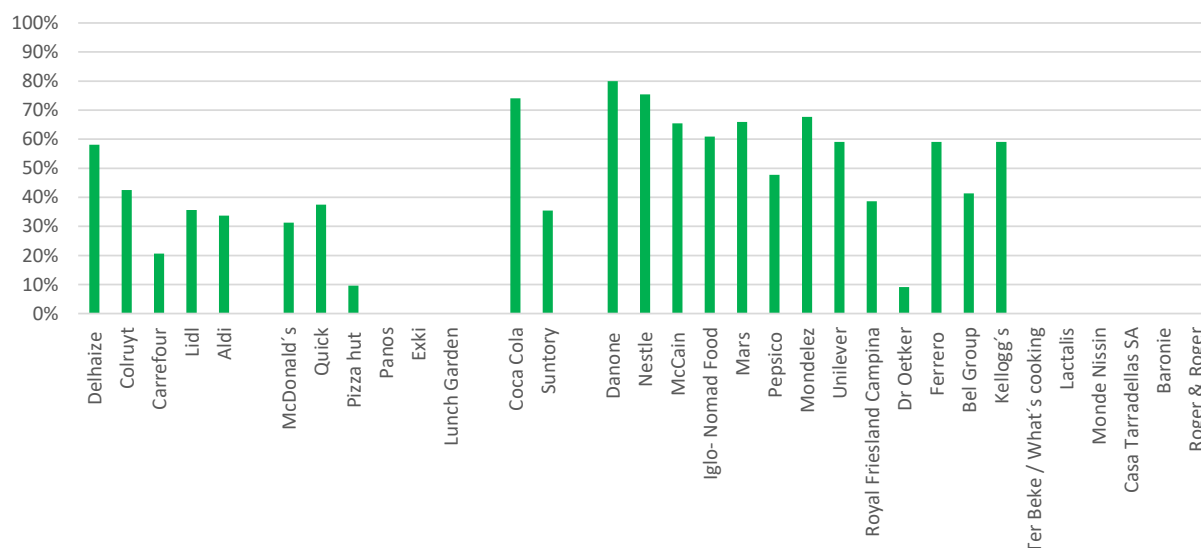
Packaged Food and Beverage Manufacturers: Four out of 21 packaged food and beverage manufacturers committed not to sponsor children's sporting, cultural, or other activities using unhealthy foods and brands.

Support for Government Restrictions: Four companies explicitly opposed government restrictions on unhealthy food marketing to children. In contrast, none of the supermarkets and quick service restaurants neither supported nor opposed any restrictions on marketing of unhealthy food to children.

Responsible Marketing Policies: No companies had developed formal responsible marketing to children policies that would effectively restrict the exposure of children and adolescents to the promotion of 'less healthy' food. Additionally, no companies had developed marketing policies for children up to 18 years of age.

RESULTS

Product and brand promotion (%)



Recommendations for action

- **Marketing to Children Policy:** Implement a marketing to children policy that effectively restricts the exposure of children and adolescents (up to age 18) to the promotion of 'less healthy' foods across broadcast and non-broadcast media. This should be done using government-endorsed standards for defining 'less healthy' foods, such as the WHO Europe nutrient profile model. Companies should routinely report on compliance with the policy.
- **Increase Healthy Product Promotion:** Commit to increasing the proportion of healthy products (using government guidelines for defining 'healthy' foods) featured in catalogues and other advertising. This will help shift consumer choices towards healthier options.
- **Eliminate Child-Appealing Promotion Techniques:** Eliminate the use of promotion techniques (e.g., cartoon characters, interactive games) with strong appeal to children in relation to 'less healthy' products. This step is crucial to reduce the influence of marketing on children's food choices.

By taking these actions, companies can play a significant role in promoting healthier eating habits among children and adolescents, contributing to better public health outcomes.

RESULTS

Findings by domain

E. Product accessibility

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

Median score

13/100

Key Findings

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

Low Commitments: The majority of the companies, had minimal to no commitments in this domain (8 companies had no commitment and 12 companies had low score- less than 20%) . This highlights a significant area for improvement in making healthier products more accessible.

Specific Commitments

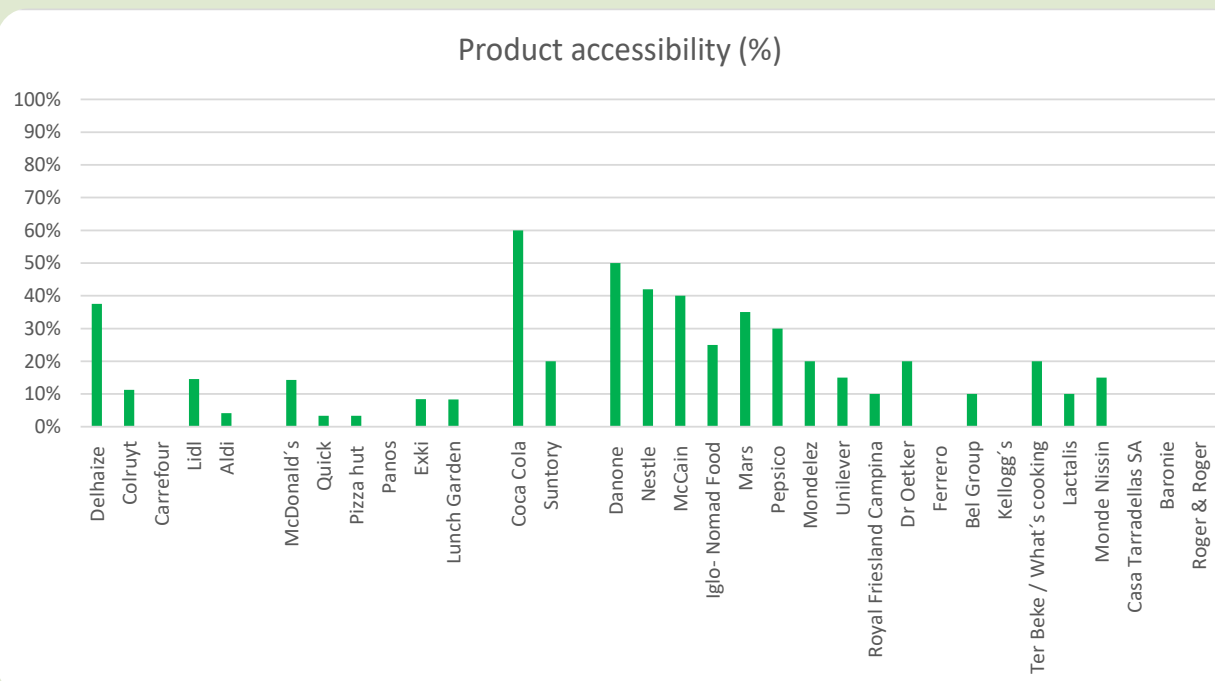
McDonald's: One of the quick service restaurants, McDonald's, committed to not provide free refills for soft drinks, a step towards reducing the consumption of sugary beverages.

Delhaize: Among the supermarkets, Delhaize committed to providing price promotions for healthy foods (Nutri-Score A and B products) either in-store or through their loyalty program.

Colruyt: Another supermarket, Colruyt, had a commitment that checkouts are free from unhealthy items (including confectionery, chocolate, and soft drinks).

Support for Fiscal Policies: Two of the packaged food and non-alcoholic beverage manufacturers, Danone and Nestle, supported the implementation of taxes on certain unhealthy food products. However, none of the supermarkets and quick service restaurants opposed fiscal policies.

RESULTS



Key recommendations for action

- **Support Fiscal Policies:** Companies should support the position of the World Health Organization on fiscal policies to make healthier foods relatively cheaper and unhealthy foods relatively more expensive. This can help shift consumer purchasing behaviour towards healthier options.
- **Increase Healthy Product Portfolio:** Introduce a commitment to increase the number/proportion of healthy products in the company's portfolio. This includes setting targets for product reformulation to enhance the nutritional profile of their offerings.
- **Limit Price Promotions:** Limit price promotions (particularly 'buy-one-get-one-free' and 'buy two and save') on 'less healthy' products. Instead, focus promotional efforts on healthier products to encourage better consumer choices.
- **Prominent Display of Healthy Products:** Increase the proportion of 'healthy' products displayed in high-traffic areas (e.g., end-of-aisle displays). This can influence purchase decisions by making healthier options more visible and accessible.

RESULTS

- **Link Rewards to Healthier Purchases:** Consistently link rewards through loyalty programs to healthier purchases. This can incentivize consumers to choose healthier options more frequently.
- **Healthy Checkouts:** Introduce universal healthy checkouts (with no confectionery or sugar-sweetened beverages) across all stores nationally. This can reduce impulse purchases of unhealthy items.
- **No Free Refills:** Commit to not provide free refills for caloric soft drinks/soda. This measure can help reduce excessive consumption of sugary beverages.
- **Proximity to Schools:** Commit to not open new quick service restaurants near primary and secondary schools. This can help limit children's exposure to unhealthy food options.

By implementing these actions, companies can play a crucial role in improving the accessibility of healthier food options, thus contributing to better public health outcomes.

RESULTS

Findings by domain

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

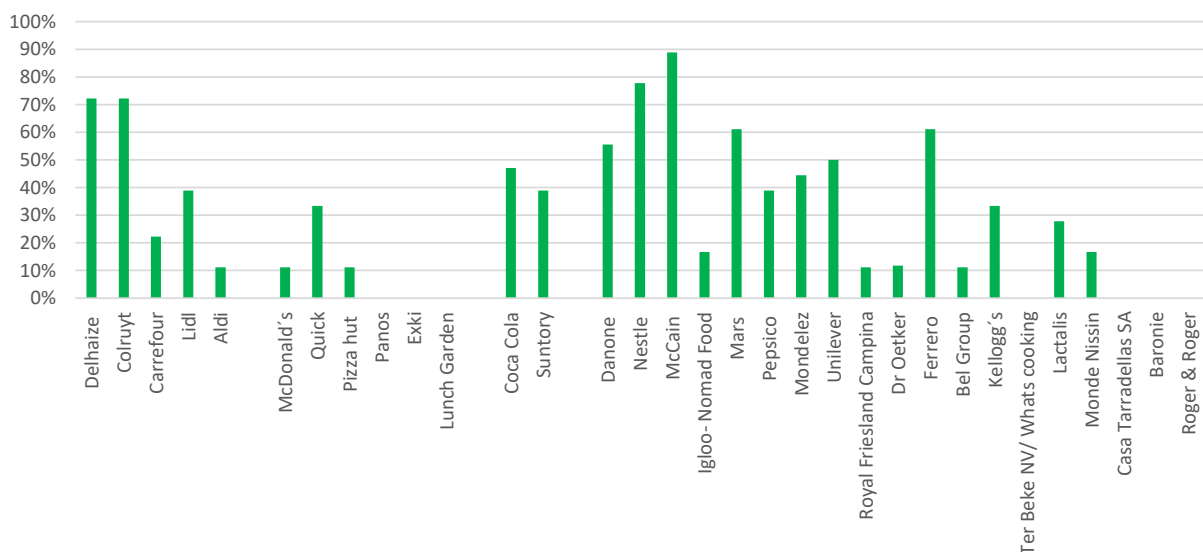
19/100

Key Findings

Seven companies did not have any commitment in this domain and the majority of the companies scored below 50% (28 companies out of 32).

Low commitments: none of the companies obtained the maximum score for this domain and declared all relationships, support for research and political donations (if any) on their national website.
No political donations: some companies specifically committed to not making any political donations.

Relationships with other organisations (%)



RESULTS

Key recommendations for action

- **Transparency:** Disclose relationships (including funding and support) with external groups (e.g., professional organisations, research organisations, community and industry groups) related to health and nutrition
- **Political donation:** Disclose all political donations in real time, or commit to not make political donations

RESULTS

Comparison of BIA-Obesity 2023 with BIA-Obesity 2019

In comparing the BIA-Obesity results from 2023/2024 with those from 2019, we focused exclusively on the companies that were included in both assessments (25 companies), excluding any companies that were not consistently evaluated across both years. The comparison aimed to provide a clear view on potential progress in improving commitments in relation to population nutrition and obesity prevention. Figure 19. Shows the overall results and indicates that 18 companies showed improvements, reflecting enhanced commitments, in particular to promote healthier products, 3 companies had almost same score in both 2019 and 2023/2024, and 5 companies had lower score in 2023/2024 than 2019. However all these 5 companies were among those we were unable to get in touch.

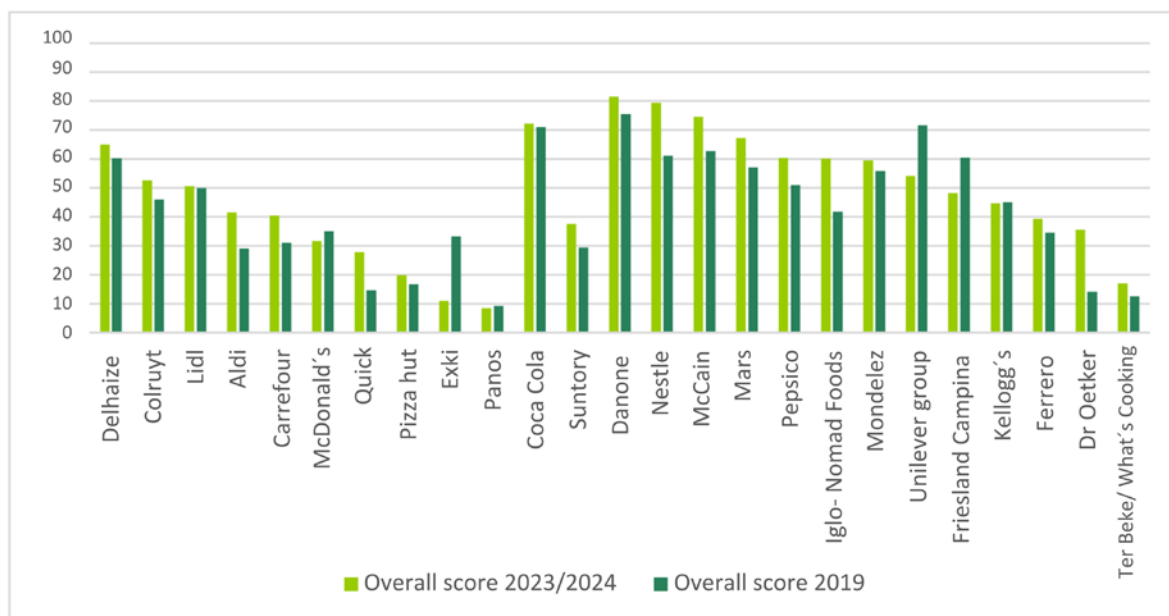


Figure 19. Comparison of the overall results of the selected companies between 2019 and 2023/2024.

The overall score of this analysis highlights the ongoing challenges and the need for sustained efforts to achieve better health outcomes through corporate responsibility and improved product offerings.

RESULTS

Packaged food and non-alcoholic beverage manufacturers

Commitments



The Figure 20. shows that while most of the companies have made notable improvements, and two of them have seen their scores decline. All but three out of 15 companies improved their overall scores compared to 2019.

We can see that some companies have a lower scores in 2023/2024 compared to 2019, such as Unilever and Friesland Campina. This could be due to the lack of engagement with company experts during the 2023 assessment. Their scores of 2023/2024 are based solely on publicly available information, which might not have fully captured the extent of their commitments and activities.

RESULTS

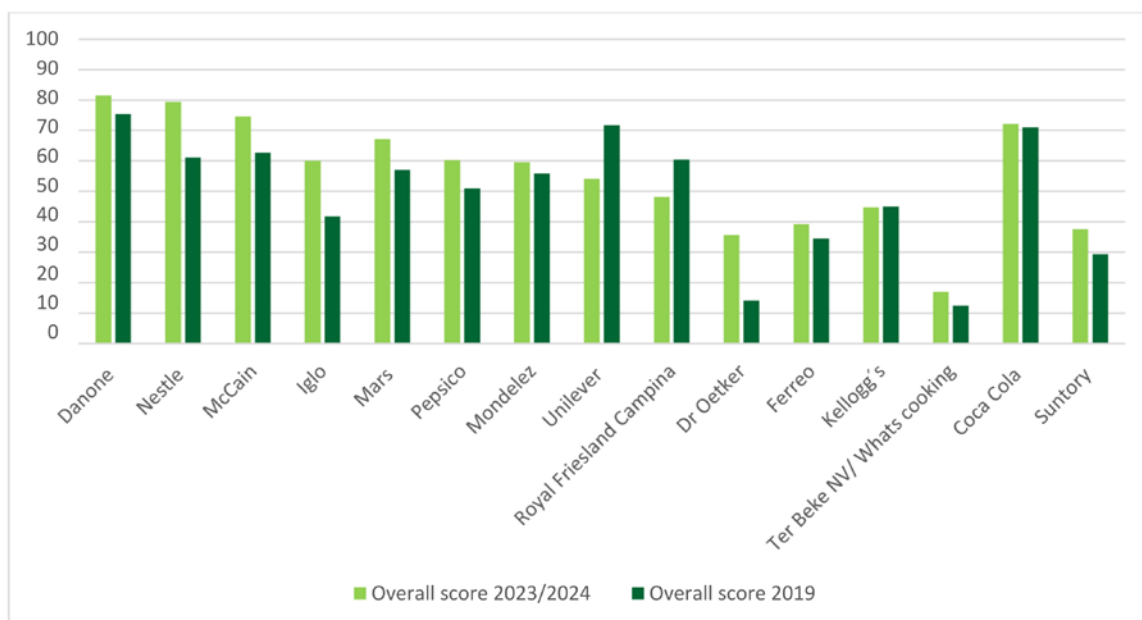


Figure 20. The comparison of companies' overall score between BIA-Obesity 2023 with BIA-Obesity 2019 -packaged food and non-alcoholic beverage manufacturers

Danone, for instance, shows a substantial improvement, with its overall score increasing from 75 in 2019 to 82 in 2023. This improvement highlights Danone's enhanced strategies in product formulation, nutrition labelling, and brand promotion. Similarly, McCain's score increased from 63 to 74, indicating progress in their health and nutrition commitments.

On the other hand, assessment shows that some companies, such as Coca Cola and Kellogg's, maintained relatively consistent scores compared to 2019, indicating a level of stability in their existing strategies. However, this steadiness suggests that while there may have been ongoing efforts, they were not substantial enough to result in significant improvements or shifts. This highlights the need for more robust and proactive strategies to drive meaningful change, especially in key domains like product formulation, nutrition labelling, and product promotion.

RESULTS

Performances

The analysis of the Nutri-score ratings between 2019 and 2023 reveals significant changes in the nutritional quality of the products in some companies, figure 21. Overall, we can see while the majority of the companies had lowered the proportion of their products with Nutri-score E in 2023, the percentage of the products with Nutri-score A in the most companies was higher in 2019 than 2023. Some companies like Danone and Friesland Campina showed significant improvement in the proportion of their Nutri-score A rating products (Danone from 18% in 2019 to 35% in 2023, Friesland Campina from 2% in 2019 to 15% in 2023), the rest of 13 companies in this sector had a lower rating of Nutri-score A products in 2023. By contrast, all the 15 companies had lower percentage of products with Nutri-score E in 2023 than 2019

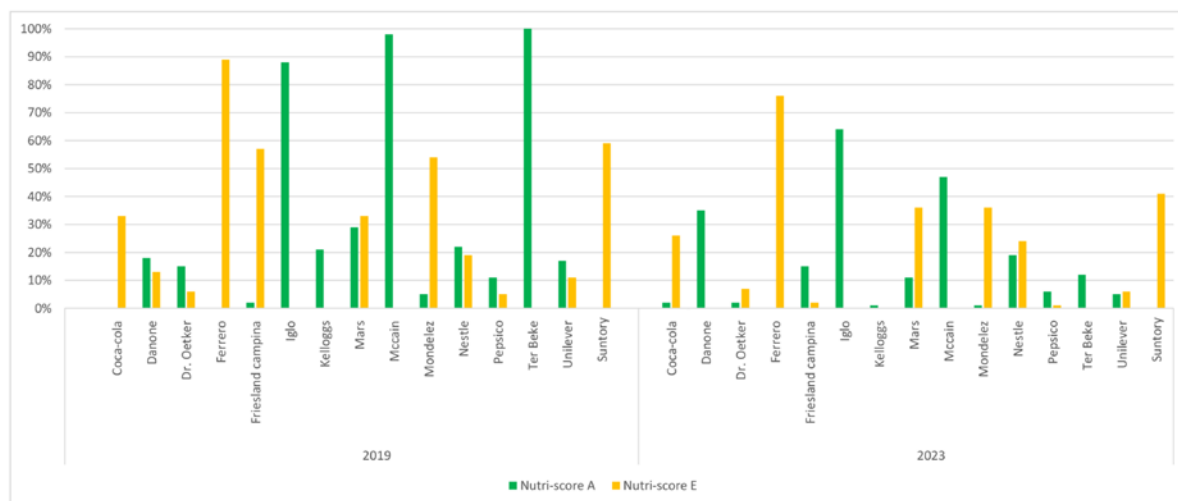


Figure 21. Nutri-score ratings of the selected companies (Packaged food and soft drink manufacturers) between 2019 and 2023

RESULTS

The comparison of company performances in product and brand promotion from 2019 and 2023 is shown in figure 22. In 2019, several companies, including Ferrero and Kellogg's, had a very high percentage of products not permitted for marketing to children, reaching 100%. Friesland Campina also had a high percentage of non-compliant products at 98%.

On the other hand, companies like Iglo and McCain performed better, with 82% and 53% of their products, respectively, being permitted for marketing to children. This suggests these companies had more products meeting the criteria for marketing to a younger audience. Unilever and Mondelez presented a mixed picture, with Unilever allowing 31% of their products for marketing and Mondelez not having any products permitted.

By 2023, there were noticeable improvements and changes. Ferrero remained at 100% of products not permitted for marketing to children, indicating no change in their product compliance. However, companies like Kellogg's saw a decrease in non-compliant products to 92%, suggesting some progress. Friesland Campina's percentage of non-compliant products remained relatively stable at 96%.

Some companies showed significant improvement over the four years. For instance, McCain increased their permitted products to 42%, and Iglo maintained a high percentage of compliant products at 86%. Unilever also improved, with 31% of their products permitted for marketing to children in 2023, showing a slight increase from 2019.

RESULTS

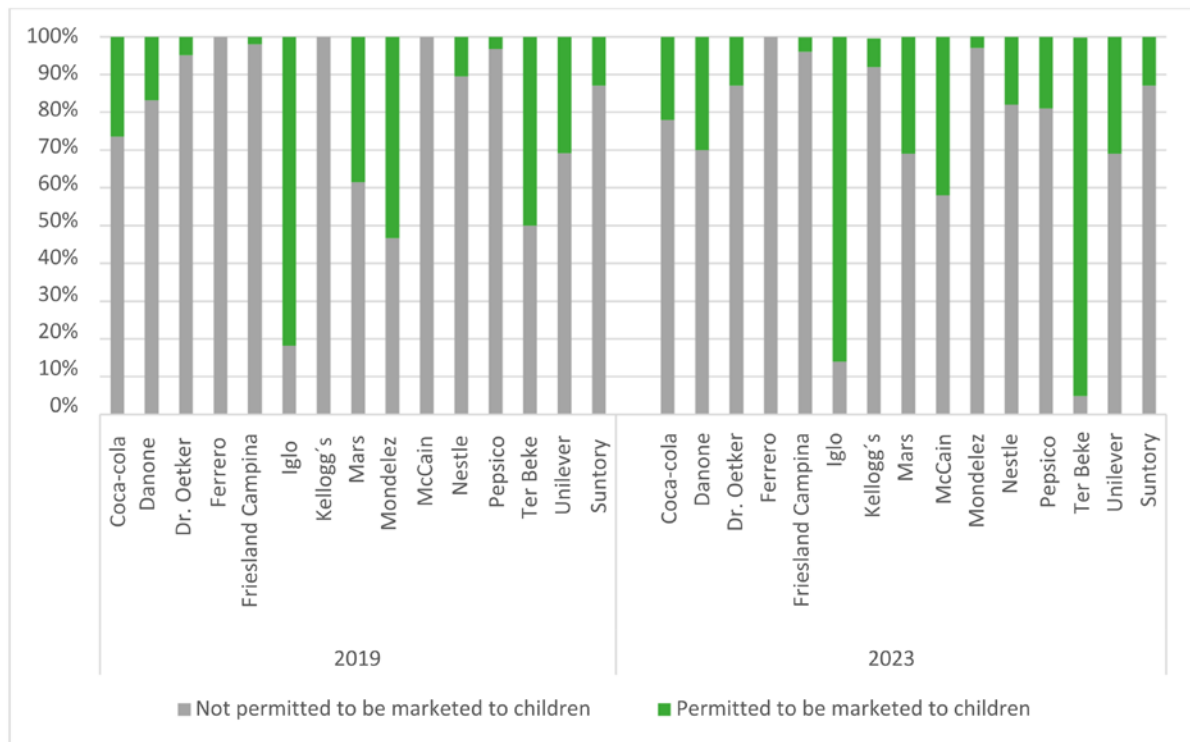
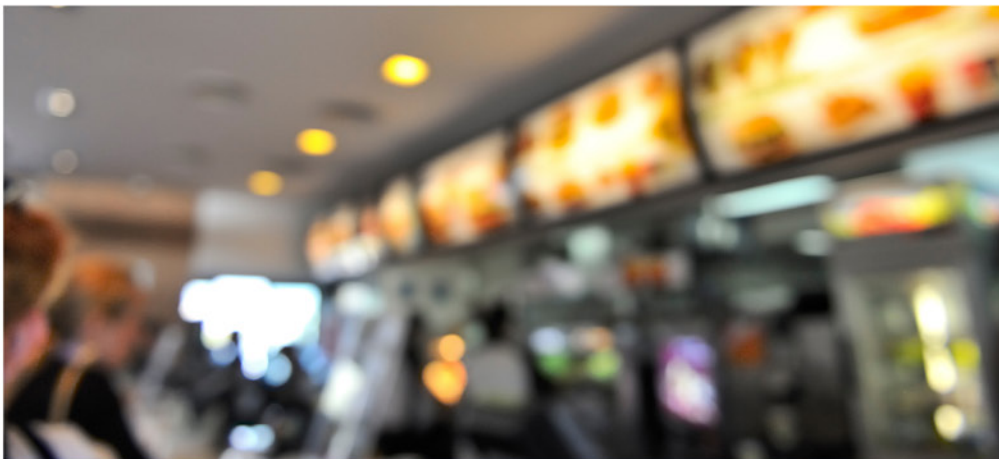


Figure 22. The comparison of the percentage of products that are permitted to be marketed to children in 2019 and 2023.

Overall, the data from 2019 and 2023 indicates varying degrees of progress among packaged food and non-alcoholic beverage manufacturers in aligning their product portfolios with marketing regulations for children. While some companies have made significant strides in increasing the percentage of compliant products, others have remained static or shown minimal improvement. This highlights the ongoing challenges and efforts within the industry to meet regulatory standards and promote healthier marketing practices to children.

RESULTS

Quick Service Restaurants Commitments



The comparison of BIA-Obesity results for quick service restaurants (QSRs) between 2019 and 2023/2024 highlights some changes in their performance regarding health and nutrition commitments. The analysis focuses on McDonald's, Quick, Pizza Hut, Panos, and Exki, providing insights into their progress or regression over the four-year period, figure 23.

RESULTS

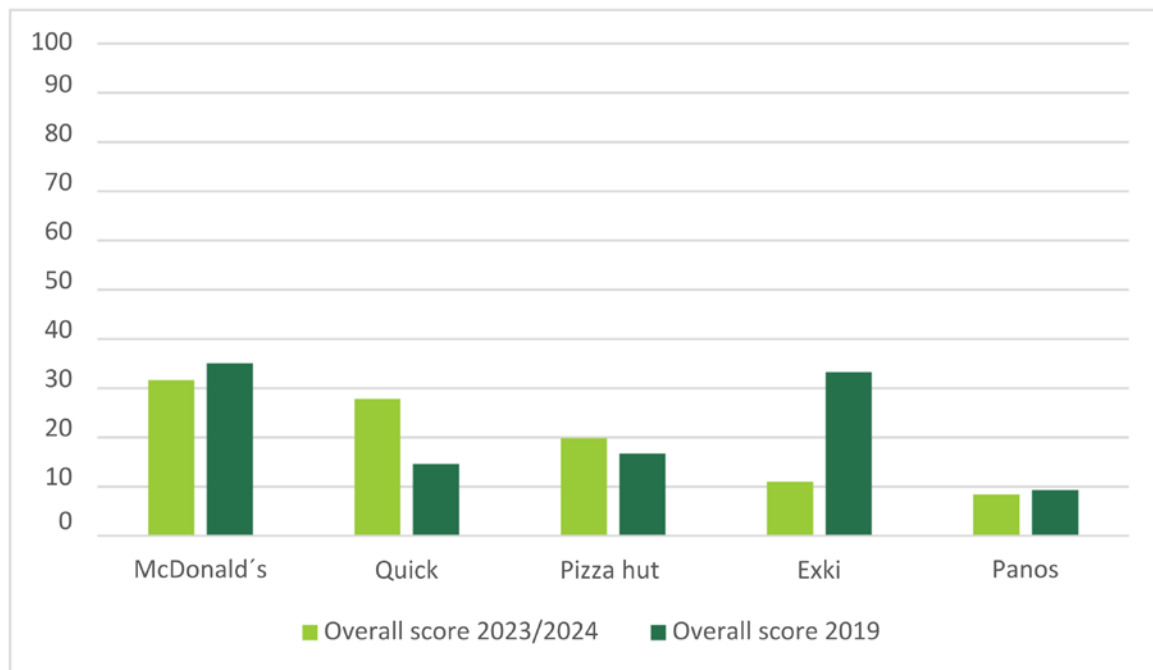


Figure 23. The comparison of overall score of BIA-Obesity 2023 with BIA-Obesity 2019 for Quick Service Restaurants.

McDonald's shows a consistent performance, with its overall score slightly decreasing from 35% in 2019 to 32% in 2023/2024. This indicates that while McDonald's has maintained a relatively stable approach to its health and nutrition commitments, there are areas where improvement is still needed. Specifically, McDonald's showed better scores in corporate nutrition strategy and product and brand promotion in 2023/2024 compared to 2019.

Between 2019 and 2023/2024, Quick's overall score increased from 15% to 28%. This improvement is primarily driven by better performance in areas such as corporate nutrition strategy and product formulation. The increase in the product and brand promotion score also contributed to the higher overall score in 2023/2024. Despite these improvements, there are still areas like product accessibility and relationships with other organizations where Quick's scores remain relatively low, indicating room for further enhancement in these specific aspects.

RESULTS

Pizza hut shows minor changes in its scores, with a slight increase from 17% in 2019 to 20% in 2023/2024. This improvement indicates some progress, especially in product formulation and nutrition labelling. However, the company still faces challenges in other areas, such as product and brand promotion, where scores have not shown significant improvement.

Panos displays relatively stable scores, with its overall score changing from 9% in 2019 to 8 % in 2023/2024. Despite this stability, Panos has not made significant strides in improving its commitments, as reflected in the low scores across most domains. This suggests a need for Panos to develop more comprehensive strategies to address health and nutrition effectively.

Exki shows a significant decrease from 33% in 2019 to 11% in 2023/2024. This substantial difference is likely due to the lack of publicly available commitments on their websites and the inability to reach company representatives for verification. The absence of detailed information has resulted in lower scores in the 2023/2024 assessment.

Overall, the comparison reveals varying levels of commitment and progress among the QSRs in addressing health and nutrition issues. The discrepancies, especially the significant drop for Exki, underscore the importance of transparency and accessible information to accurately reflect a company's efforts and improvements in these critical areas.

RESULTS

SUPERMARKETS

Commitments



The comparison of BIA-Obesity results for supermarkets between 2019 and 2023/2024 is demonstrated in the Figure 24. The results reveals notable changes in their performance regarding health and nutrition commitments. The analysis focuses on five major retailers: Delhaize, Colruyt, Carrefour, Lidl, and Aldi, providing insights into their progress or regression over the four-year period.

RESULTS

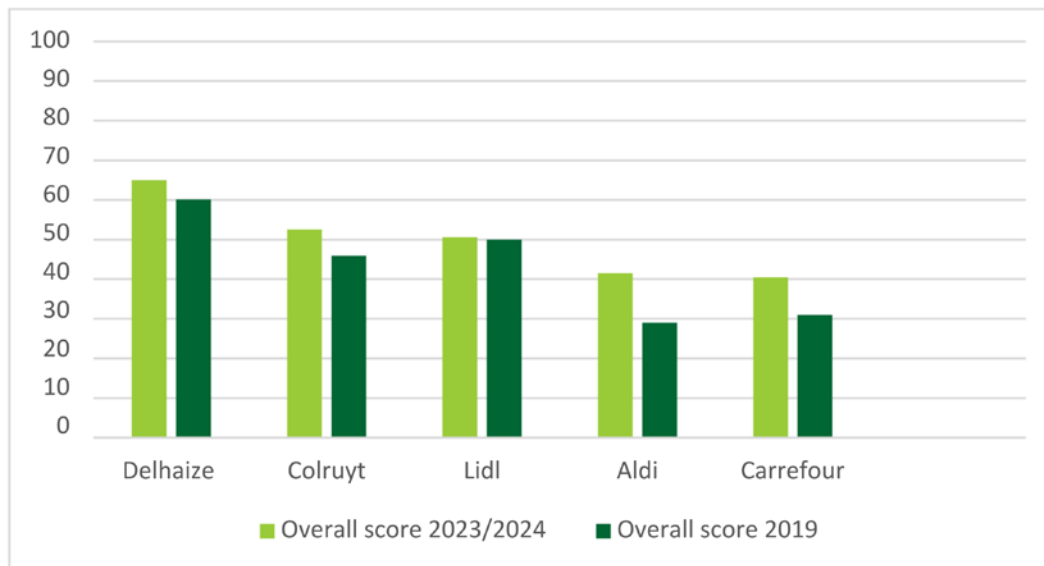


Figure 24. The comparison of overall score of BIA-Obesity 2023/2024 with BIA-Obesity 2019 for supermarkets.

The comparative analysis of the BIA-Obesity results for supermarkets indicates varied performance trends across the companies assessed. Four out of the five supermarkets showed an improvement in their overall scores from 2019 to 2023/2024, reflecting advancements in their health and nutrition initiatives. In contrast, Lidl maintained a consistent score over the period, suggesting stability in its existing strategies without significant changes.

A closer evaluation of individual domains reveals that there were notable improvements in areas such as product formulation, accessibility, and relationships with other organizations, indicating a more concerted effort in these aspects. However, domains like corporate nutrition strategy showed little change, suggesting that existing strategies have remained steady. These insights underscore the varied levels of progress within the supermarket sector, highlighting both areas of advancement and those requiring further enhancement to support healthier food environments.

RESULTS

Performances

The comparison of the nutrition data between 2019 and 2023 in supermarkets shows a remarkable improvement. All five selected supermarkets had higher percentage of products with Nutri-score A and a decrease in the percentage of their products with Nutri-score E.

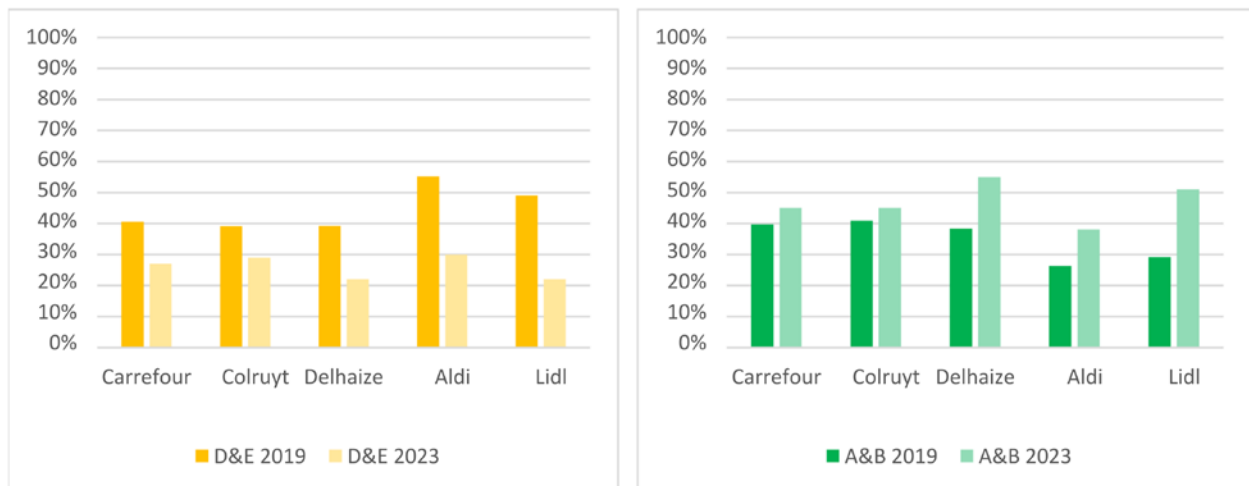


Figure 25. Nutri-score ratings of the selected companies (supermarkets) between 2019 and 2023.

RESULTS

The comparison between supermarket portfolios in relation to the proportion of products not-permitted to be marketed to children and products permitted to be marketed to children shows a remarkable change from 2019 to 2023, Figure 26. All the five selected supermarkets had an increase in the percentage of the products that are permitted to be marketed to children and a decrease in the products that are not permitted to be marketed to children.

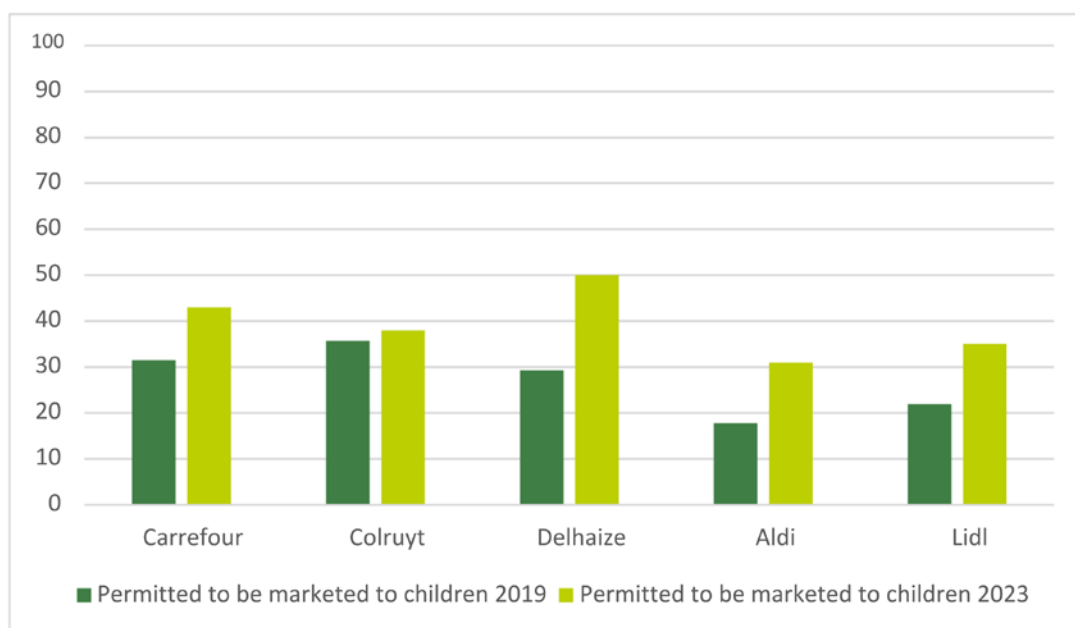


Figure 26. The comparison of the percentage of products that are permitted to be marketed to children in 2019 and 2023.

BIA-SUSTAINABILITY



We evaluated 33 companies across various sectors, including packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets and quick service restaurants. The primary data for this study were sourced from the companies' own sustainability reports. Additionally, documents such as the Carbon Disclosure Project (CDP) reports and the Plastic Economy Global Commitment (PEGC) influenced the scoring. Notably, many of the weakest-scoring indicators pertained to the measurement of the company's impact and the impact of its suppliers. Moreover, commitments related to suppliers were relatively difficult to locate.

RESULTS

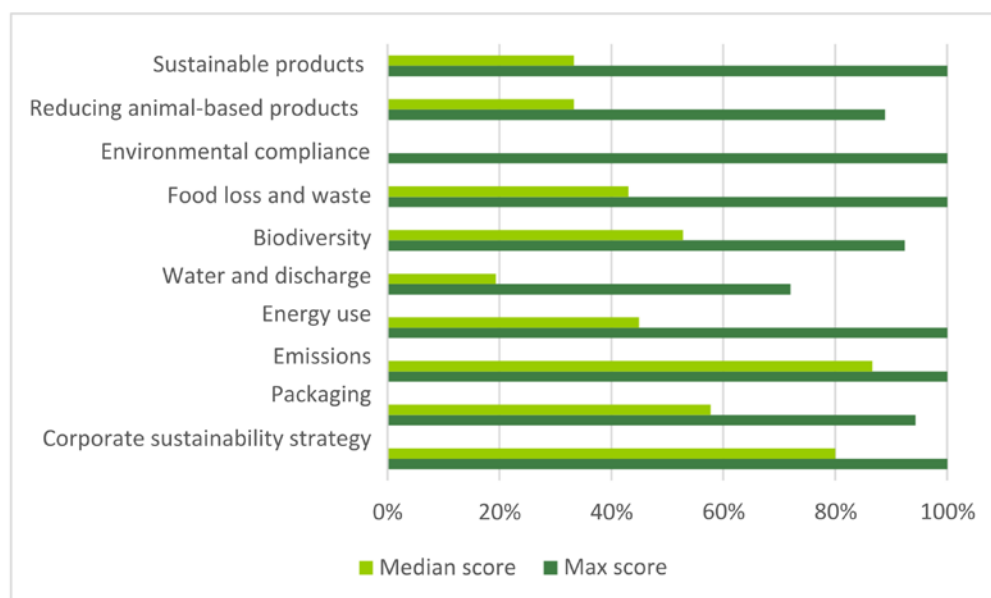


Figure 27. BIA-sustainability maximum and median score for all the companies 2023.

The results for the selected 33 companies reveal notable variations in sustainability performance across different domains. The Emissions domain ranks the highest among the companies, with a median score of 87%, reflecting significant efforts to reduce greenhouse gas emissions. The Corporate Sustainability Strategy domain also shows strong alignment, with a median score of 80%, indicating a broad commitment to integrating sustainability into overarching strategies. However, progress in packaging (58%), biodiversity (53%), Food losses and waste (43%) and energy use (45%) is more moderate, suggesting opportunities for improvement in these critical areas.

On the lower end, water and discharge domain receives median score of 19%, highlighting substantial gap in efforts to manage water resources. Particularly concerning is environmental compliance, which has a median score of 0%, underscoring systemic shortcomings in adhering to regulatory standards. Efforts in reducing animal-based products and sustainable products also lag, with both domains scoring 33%.

FINDINGS BY SECTOR

Packaged food and non-alcoholic beverage manufacturers

The median and maximum scores of the packaged food and beverage manufacturers are presented in the Figure 28. The scores across companies provide a benchmark for typical performance levels in the industry. For instance, the median score for corporate sustainability strategy is 80%, suggesting that most companies have well-developed sustainability plans. In packaging, the median score is 55%, indicating moderate performance with significant room for improvement in reducing packaging waste.

Emissions management leads the way with a median score of 91%, indicating a widespread and robust focus on reducing greenhouse gas emissions. Biodiversity efforts follow with a respectable median score of 60%, suggesting a reasonable prioritization of this area. Energy use and food loss and waste management show moderate progress, with median scores of 43% and 42%, respectively, highlighting variability in company performance in these areas. However, water and discharge management remains a weaker area, with a median score of 31%, signaling the need for enhanced efforts in responsible water use and pollution control.

Sustainable products and reducing animal-based products remain underdeveloped, with median scores of 30% and 22%, respectively, indicating considerable room for growth in these areas. Most concerning is environmental compliance, with a median score of 0%, reflecting systemic gaps in meeting regulatory and ethical standards. These findings underscore the need for companies to maintain their strong performance in emissions and biodiversity while adopting more comprehensive strategies to address weaker areas such as water management, sustainable products, and compliance with environmental regulations.

RESULTS

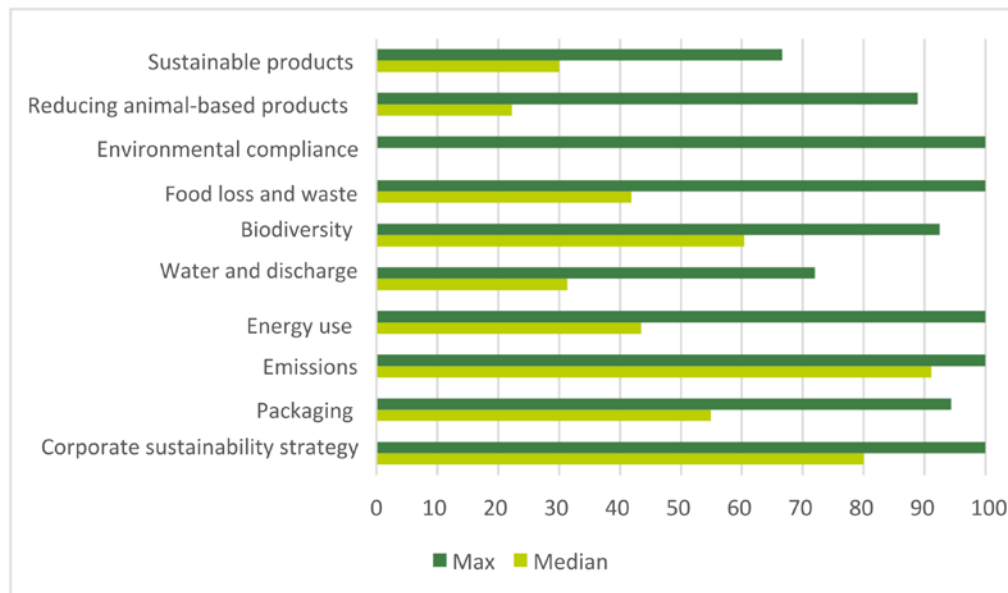


Figure 28. The overall results of BIA-sustainability for packaged food and beverage manufacturers.

Overall, Coca Cola and Danone are the best performers, consistently scoring high across most domains, showcasing comprehensive sustainability strategies and effective implementation. Conversely, companies like Lactalis Group and Roger & Roger are among the worst performers, with low scores in several critical areas, indicating a need for substantial improvement in their sustainability practices. We would like to mention that we could not reach the sustainability experts in Lactalis, neither in Roger & Roger to confirm the publicly available commitments collected from their website.

In summary, while some companies are leading the way with robust sustainability initiatives, others need to enhance their efforts to address environmental challenges comprehensively. The data highlights the importance of a holistic approach to sustainability, encompassing emissions reduction, resource efficiency, biodiversity protection, and compliance with environmental regulations.

RESULTS

Quick Service Restaurants

Quick-Service Restaurants (QSR) exhibit a strong commitment to sustainability at a strategic level, with an overall median score of 80% for corporate sustainability strategy. However, their performance across specific areas shows significant variability. The Emissions and Energy Use domains each achieve a median score of 43%, reflecting moderate efforts, while the Packaging domain scores slightly higher, with a median of 45%. Food loss and waste management scores 33%, indicating some progress but also revealing room for improvement, particularly in reducing inefficiencies and redistributing surplus food.

Sustainable products achieve a median score of 30%, reflecting a growing focus but highlighting significant potential for further development. Lower scores in biodiversity 17% and reducing animal-based products 22% underscore critical areas that require greater attention and improvement. Water and discharge management scores only 4%, indicating minimal action in this domain, while environmental compliance is entirely lacking, with a median score of 0%. These figures underscore the need for QSRs to balance their strong strategic focus with more comprehensive actions across under-performing areas, particularly in water management and regulatory compliance, to achieve meaningful progress in sustainability.

RESULTS

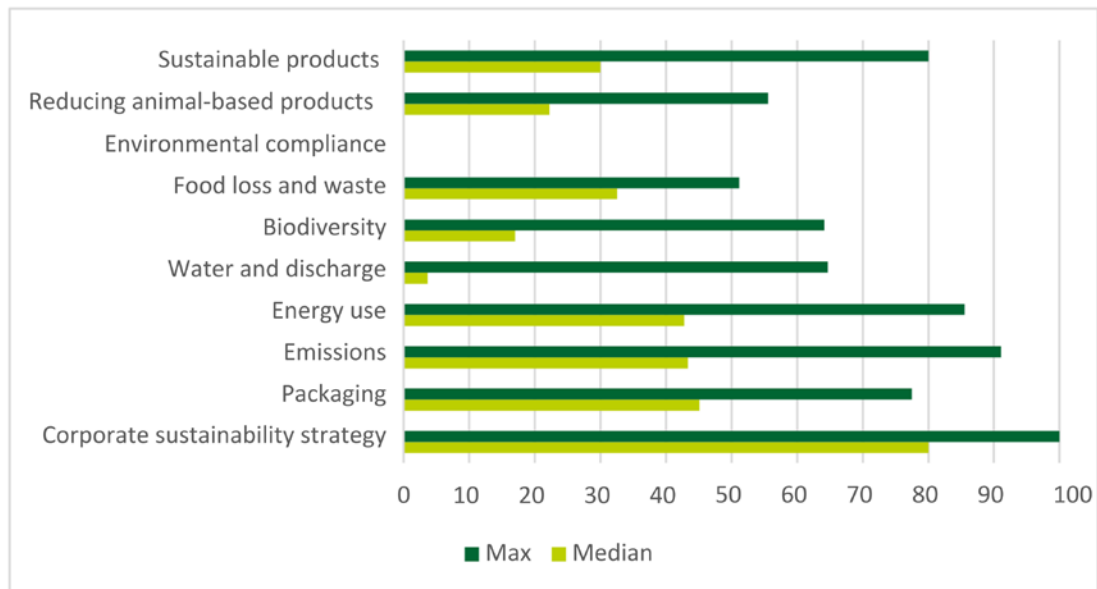


Figure 29. The overall results of BIA-sustainability for Quick Service Restaurants

In summary, McDonald's and Pizza Hut are the best overall performers, consistently achieving high scores across multiple domains. Their comprehensive sustainability strategies and implementation efforts are noteworthy. On the other hand, Exki and Lunch Garden had the lowest scores, with no commitments across several key areas, indicating a significant need for improvement in their sustainability practices. While some Quick Service Restaurants are leading the way with robust sustainability initiatives, others need to enhance their efforts to address environmental challenges comprehensively. The data highlights the importance of a holistic approach to sustainability, encompassing emissions reduction, resource efficiency, biodiversity protection, and compliance with environmental regulations.

RESULTS

Supermarkets

Supermarkets demonstrate a solid commitment to sustainability, with a notable performance across specific domains. Emissions management leads with an impressive median score of 96%, reflecting strong efforts to reduce greenhouse gas emissions. Sustainable products follow closely with a score of 80%, indicating a significant focus on offering environmentally friendly options. Packaging also performs well, achieving 66%, showcasing attention to reducing waste and improving recyclability.

Corporate sustainability strategy achieves a median score of 60%, reflecting a broad commitment to embedding sustainability into overarching business practices. Reducing animal-based products scores 56%, indicating growing attention to this important area. Biodiversity efforts achieve a median score of 53%, while energy use slightly lags behind at 59%, suggesting moderate progress in these domains.

Some areas, however, require significant improvement. Food loss and waste management sits at 49%, highlighting the need for more effective measures to address inefficiencies. Water and discharge scores only 17%, demonstrating critical gaps in efforts to manage water use and pollution. Lastly, environmental compliance is critically lacking, with a score of 0%, underscoring the need for immediate action in this area.

These results reveal that while supermarkets excel in emissions reduction and sustainable product offerings, addressing weaker areas like water management and environmental compliance will be essential to achieving a more comprehensive and balanced sustainability profile.

RESULTS

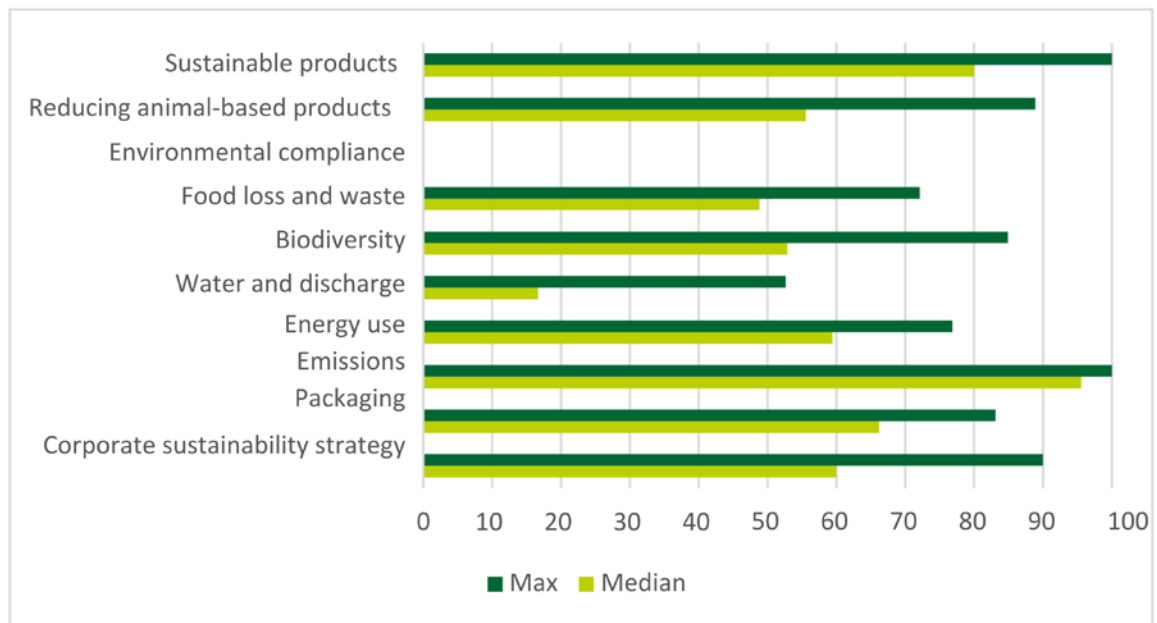


Figure 30. The overall results of BIA-sustainability for supermarkets .

Overall, Delhaize and Lidl are the best performers, consistently achieving high scores across multiple domains. Their comprehensive sustainability strategies and implementation efforts are noteworthy. On the other hand, Colruyt and Aldi are among the worst performers, with lower scores across several key areas, indicating a significant need for improvement in their sustainability practices.

In summary, while some retailers are leading the way with robust sustainability initiatives, others need to enhance their efforts to address environmental challenges comprehensively. The data highlights the importance of a holistic approach to sustainability, encompassing emissions reduction, resource efficiency, biodiversity protection, and compliance with environmental regulations.

RESULTS

FINDINGS BY DOMAINS



RESULTS

Findings by Domain

Corporate Sustainable Strategy

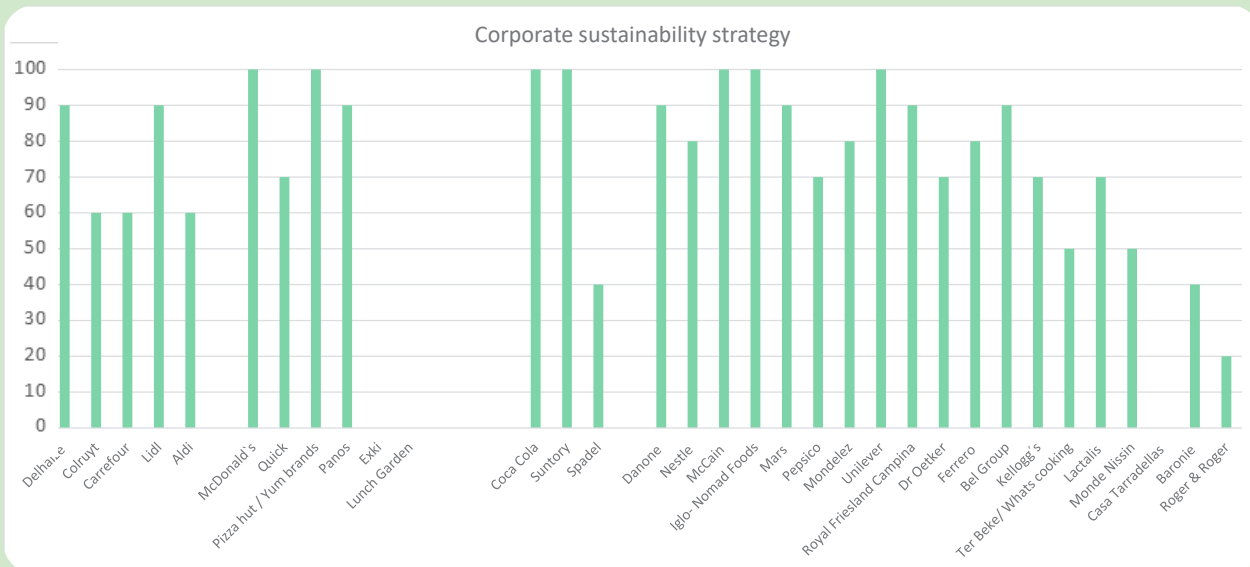


Figure 31. Corporate sustainability strategy domain overall score for all the selected companies.

The Figure 31. illustrates the extent to which various companies have implemented their corporate sustainability strategies, measured in percentages.

In the retailer sector, Delhaize and Lidl have made significant strides with a 90% implementation rate, while Colruyt, Carrefour, and Aldi each show a 60% implementation rate. This suggests that while some companies are leading in their sustainability efforts, others are progressing but have more work to do.

In the fast food sector, McDonald's stands out with a complete implementation of its sustainability strategy at 100%. Quick and Pizza hut have achieved a 70% implementation rate, indicating a strong but not yet complete commitment. Panos is notable with a 90% implementation rate, reflecting a high level of dedication to sustainability. On the other hand, Exki and Lunch Garden show a lack of significant progress, with 0% implementation reported.

Coca Cola and Suntory both exhibit a full commitment to sustainability, each achieving a 100% implementation rate, while Spadel lags behind with only 40%. This indicates a stark contrast in sustainability efforts within the beverage industry.

RESULTS

In the packaged food manufacturing sector, McCain, Unilever and Iglo with the highest score of 100% followed by Danone and Mars with the score of 90% implemented their sustainability strategies and demonstrating a strong commitment. Nestle and Mondelez are at 80%, indicating considerable efforts but with room for further improvement. Other notable mentions include Pepsi Co and Unilever group at 70%, and Royal Friesland Ca at 90%. Conversely, companies such as Roger & Roger, with a 20% implementation rate, show that significant improvements are still needed in their sustainability efforts.

Overall, the corporate strategy has the highest score in the sustainability assessment but the results highlight a varied landscape of corporate sustainability strategy implementation across different companies and sectors, with some showing complete commitment and others still in the early stages of their sustainability journeys.

Key recommendations for action

- Disclosing publicly available commitment on participating to UNGC or disclose SDGs alignment
- Disclosing measurable / timebound targets to identify and prioritise for action the issues which have the most impact on the environment (environmental materiality)
- Disclosing measurable / timebound targets to screen the suppliers based on environmental

RESULTS

Findings by Domain

Packaging



Figure 32. Packaging domain overall score for all the selected companies

The Figure 32. provides information on the progress of various companies in implementing sustainable packaging practices, expressed as percentages.

In the retail sector, Delhaize leads with an 83% implementation rate, followed by Carrefour at 72%, Lidl at 66%, and Aldi at 61%. Colruyt is further behind with a 46% implementation rate. These figures suggest that while some retailers are advancing well in sustainable packaging, others are still working towards more comprehensive implementation.

In the fast food industry, McDonald's shows a strong commitment with a 75% implementation rate. Pizza hut follows closely with 77%, indicating significant progress. Panos has a 63% implementation rate, whereas Quick and Exki are much lower at 27% and 3% respectively. Lunch Garden has not yet made any reported progress, with a 0% implementation rate.

Among beverage companies, Coca Cola demonstrates substantial efforts with an 83% implementation rate. Suntory shows moderate progress at 58%, and Spadel lags behind with 34%. This highlights a varied approach to sustainable packaging within the beverage sector.

RESULTS

In the food manufacturing sector, McCain stands out with a 94% implementation rate, indicating a high level of commitment to sustainable packaging. While Mondelez has achieved a 69% implementation rate, Iglo also shows significant progress at 89%. Companies like Danone, Nestle, and Mars have implementation rates of 55%, 61%, and 61% respectively, showing moderate progress. Unilever group and Monde Nissin have lower rates at 28% and 27%, respectively, indicating more room for improvement. Dr. Oetker, Ferrero & related partners, Bel Group, Kellogg's Co, and others show varying degrees of progress, with implementation rates ranging from 41% to 58%. Notably, companies like Casa Tarradellas and Roger & Roger show minimal to no progress, with implementation rates of 7% and 0%, respectively. Overall, the results show a diverse landscape of sustainable packaging efforts among different companies and sectors, with some making significant strides and others still in the early stages of implementation.

Key recommendation for packaging

- The company and its suppliers commit to reducing packaging, locally relevant recovery pathways for packaging, prioritising the use of recycled materials and renewable sources with SMART objectives and publicly disclosing the commitment.
- The company and its suppliers commit to reducing packaging with SMART objectives and publicly disclosing the commitment.
- The company and its suppliers commit to reducing packaging, locally relevant recovery pathways for packaging, prioritising the use of recycled materials and renewable sources with SMART objectives and publicly disclosing the commitment.

RESULTS

Findings by Domain

Emission

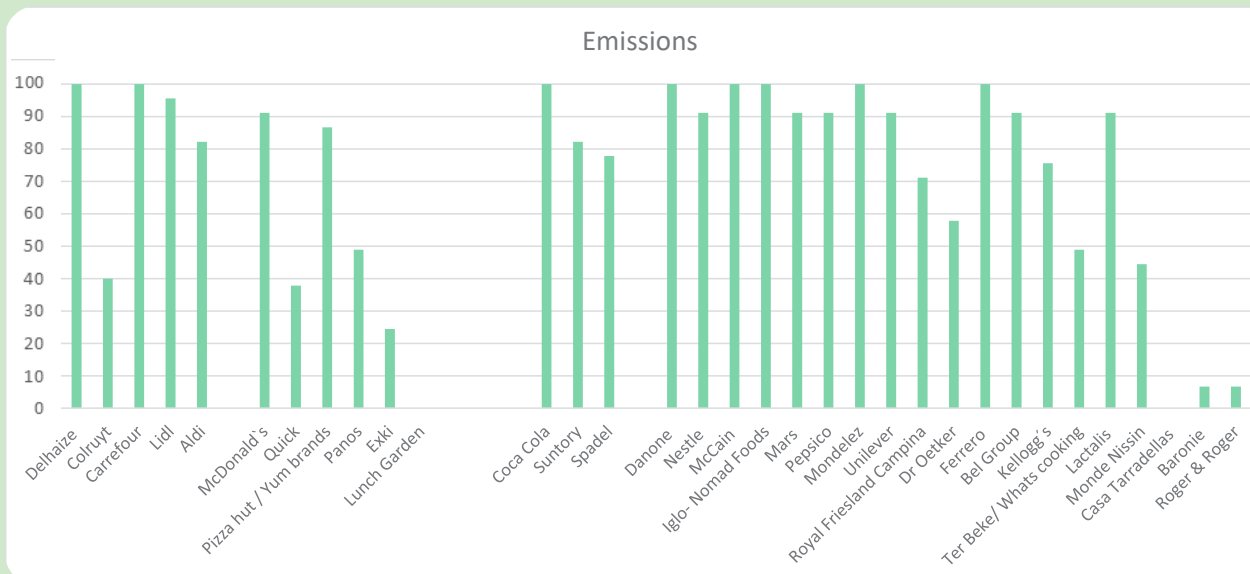


Figure 33. Emissions domain overall score for all the selected companies

The Figure 33. displays the percentage of emissions reduction initiatives implemented by various companies, highlighting their efforts towards sustainability.

In retailer sector, Delhaize leads with a complete 100% implementation rate in emissions reduction. Carrefour and Lidl also show high commitment with 100% and 96% respectively, while Aldi follows closely at 82%. Colruyt, on the other hand, has a significantly lower implementation rate of 40%, indicating less progress compared to its peers in the retail sector.

In the fast food industry, McDonald's has a notable 91% implementation rate, reflecting strong efforts in emissions reduction. Pizza hut follows with 87%, showing substantial progress as well. Panos has made moderate strides with a 49% implementation rate, while Quick and Exki lag behind with 38% and 24% respectively. Lunch Garden has made no reported progress, standing at 0%.

Coca Cola has achieved a 100% implementation rate in emissions reduction, demonstrating full commitment. Suntory and Spadel have implementation rates of 82% and 78% respectively, indicating significant but less comprehensive efforts.

RESULTS

Danone, McCain, Iglo, Ferrero and Mondelez have all achieved full 100% implementation rates, showcasing their complete commitment to reducing emissions. Nestle, Mars , Pepsi Co, and Unilever group also show strong efforts with implementation rates of 91%. Royal Friesland Campina and Ferrero & related parties have made considerable progress with 71% and 100% respectively. Other companies such as Dr. Oetker, Bel Group, and Kellogg's Co display varying levels of implementation, ranging from 58% to 91%. Some companies, like Casa Tarradellas , and Roger & Roger, have low implementation rates of 0%, and 7%, respectively, indicating substantial room for improvement. Overall, the results indicate a varied landscape of emissions reduction initiatives across different companies and sectors. Some companies are leading with full implementation, while others are still at the beginning stages of their sustainability efforts.

Key recommendations for emissions

- Disclosing timebound/ measurable targets for reduce their GHG emission
- Participating in thematic benchmarking such as Carbon Disclosure Project (CDP climate)
- Screening the suppliers for measuring of their GHG breakdown and reducing their GHG emission

RESULTS

Findings by Domain

Energy Use

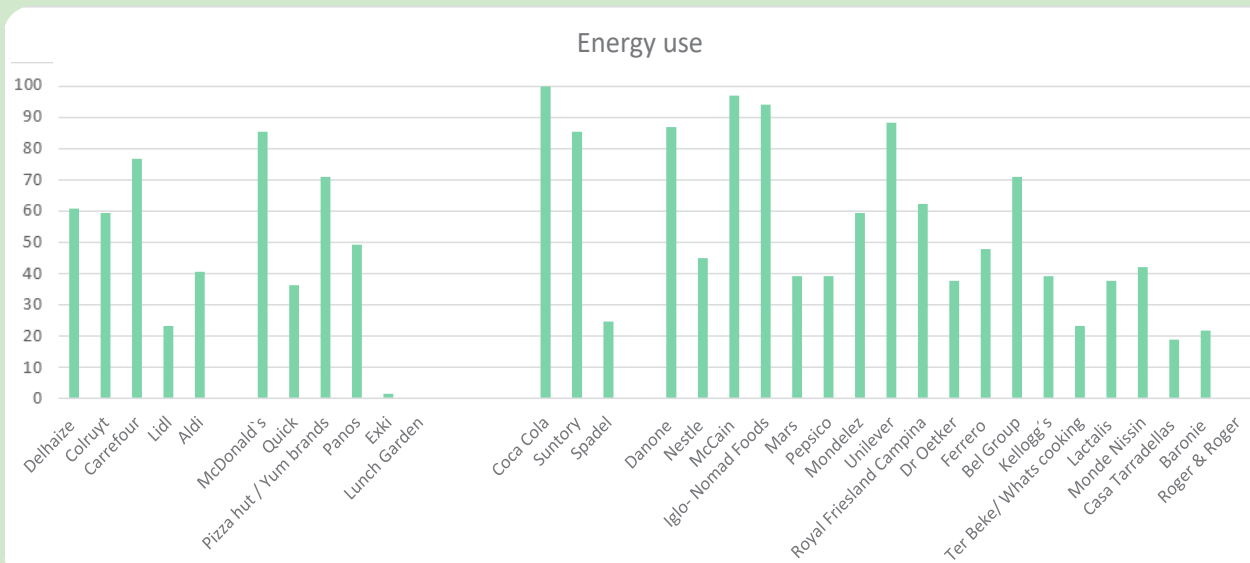


Figure 34. Energy use domain overall score for all the selected companies.

The Figure 34. presents data on the implementation of energy use reduction initiatives by various companies, expressed as percentages.

In the retail sector, Carrefour leads with a 77% implementation rate in energy use reduction. Delhaize and Colruyt follow with 61% and 59% respectively, indicating moderate progress. Aldi has implemented 41% of its energy use reduction initiatives, while Lidl shows a lower rate of 23%. In the fast food industry, McDonald's demonstrates a strong commitment with an 86% implementation rate. Pizza hut also shows significant progress at 71%. Panos has a moderate implementation rate of 49%, whereas Quick and Exki have lower rates of 36% and 12% respectively. Lunch Garden has not reported any progress, standing at 0%.

Coca Cola has achieved a full 100% implementation rate in energy use reduction, showing complete commitment. Suntory follows with 86%, indicating substantial efforts, while Spadel lags behind with a 25% implementation rate.

RESULTS

In the food manufacturing sector, Danone has an 87% implementation rate, showcasing strong efforts in reducing energy use. McCain leads with a 97% implementation rate, followed by Iglo that has implemented 94% of its initiatives. While the majority of the packaged food companies show varied levels of commitment with rates of 22%, 71%, notably, Roger & Roger scored 0% respectively, indicating significant room for improvement.

Overall, the result reflects a diverse landscape of energy use reduction efforts across different companies and sectors. While some companies have made significant strides with high implementation rates, others are still in the early stages of their sustainability initiatives.

Key recommendations for energy use

- The company and its suppliers annually measure and publicly report their greenhouse gas emissions breakdown through an externally audited reporting system (including all final energy: electricity, gas, fuel for trucks, ...)
- The company and its suppliers publicly commit to reducing and/or avoiding greenhouse gas emissions with measurable and timebound targets.
- Screening the suppliers for the energy use criteria including reducing energy consumption,

RESULTS

Findings by Domain

Water and Discharge

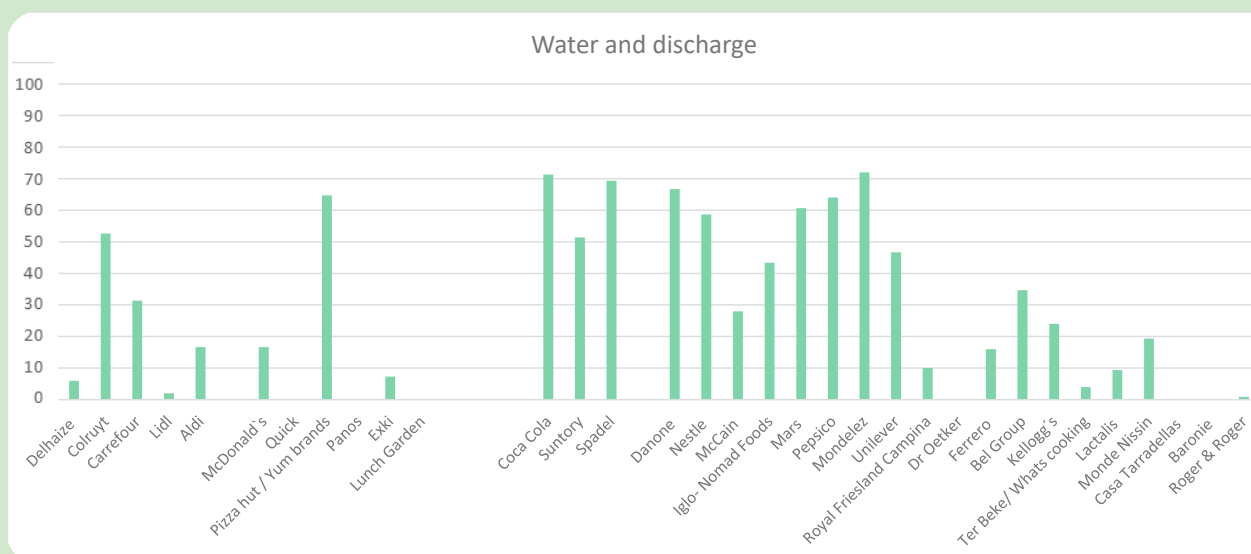


Figure 35. Water and discharge domain overall score for all the selected companies.

The Figure 35. illustrates the percentage implementation of water and discharge management initiatives by various companies.

In the retail sector, Colruyt with the highest score of 53% , indicating a moderate level of progress in managing water and discharge. Delhaize and Lidl have the lowest score of 6% and 2% of their water and discharge management initiatives, which shows significant rooms for improvement.

For the fast food industry, Pizza hut has a 65% implementation rate, reflecting substantial efforts. McDonald has made some progress with a 17% rate, while the rest of the companies in this sector show minimal to no progress, with rates of 7% and 0%, respectively.

Coca Cola leads the beverage sector with a 71% implementation rate in water and discharge management. Suntory and Spadel follow with 51% and 69% respectively, showing moderate commitment to these initiatives.

In the food manufacturing sector, Mondelez with the highest score of 72% indicating strong efforts followed by Danone 67%, PepsiCo 64% and Mars 61%/. While the majority of the companies have moderate scores varying from 16% to 47% , companies like Ter Beke/ What's cooking?, Lactalis group, Casa Tarradellas , and Roger & Roger have low to minimal implementation rates, with Roger & Roger showing no progress at 0%.

RESULTS

Overall, the results show a varied landscape of water and discharge management efforts across different companies and sectors. While domain is one of the weakest domain in BIA-sustainability , some companies have made significant strides, despite the fact that the majority of the companies are still at the beginning stages of their water related commitments and initiatives.

Key recommendations for water and discharge

- The company and its suppliers annually measure and publicly report their water footprint, water withdrawal from areas of water stress, water consumption and the quality of their water discharge using an external reporting system audited externally.
- The company and its suppliers publicly commit to reducing water withdrawal, water footprint, water consumption and to ensuring the appropriate treatment of water discharge, all with measurable and timebound targets
- The company and its suppliers annually measure and publicly report their water withdrawal, water footprint, water withdrawal from areas of water stress, water consumption and the quality of their water discharge using an external reporting system audited externally.
- The company and its suppliers publicly commit to reducing water withdrawal, water footprint, water withdrawal from areas of water stress, water consumption and to ensuring the appropriate treatment of water discharge, all with measurable and timebound targets
- Participate on the thematic benchmarks such as Carbon Disclosures Project/ CDP Water

RESULTS

Findings by Domain

Biodiversity

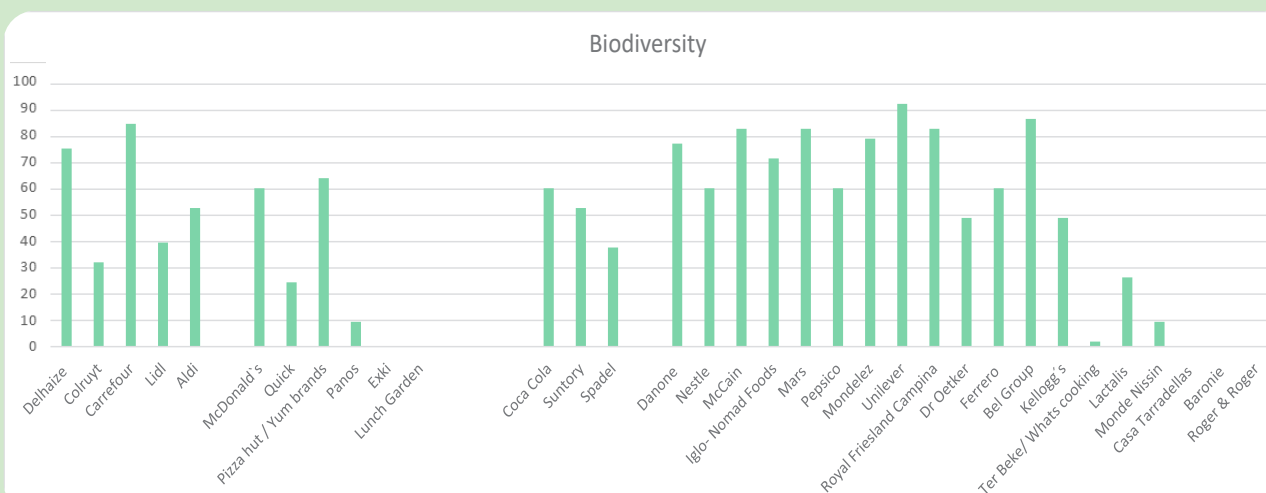


Figure 36. Biodiversity domain overall score for all the selected companies.

The Figure 36. provides an overview of the extent to which various companies have implemented biodiversity initiatives, represented as percentages.

Delhaize shows a robust commitment to biodiversity with a 75% implementation rate, while Carrefour leads with an impressive 85%. Lidl and Aldi demonstrate moderate engagement with rates of 40% and 53%, respectively. Colruyt lags behind in this area, with a 32% implementation rate. In the fast food sector, Pizza hut has achieved a 64% implementation rate for its biodiversity initiatives, indicating significant efforts. McDonald's is close behind with 60%, reflecting strong engagement. Quick shows some progress at 25%, while Exki, and Lunch Garden have no engagement, with rates of 0%, respectively.

Coca Cola stands at a 60% implementation rate, highlighting moderate efforts towards biodiversity. Suntory and Spadel show lower engagement with rates of 53% and 38%, respectively.

In the food manufacturing sector, Unilever leads with a 92% implementation rate, showing a high level of commitment. McCain, Friesland Campina and Mars follow closely with rates of 83% each. While the majority of the companies show moderate to higher engagement with rates of 26% and 79%, Ter Beke/ What's cooking?, Monde Nissin, Baronie, Casa Tarradellas, and Roger & Roger have low to minimal implementation rates.

Key recommendations for biodiversity

- The company and its suppliers identify, annually measure, and publicly report their biodiversity impacts (overexploitation, endangered and invasive species, habitat loss and fragmentation, pollution, climate change, etc.) using an externally audited reporting system,
- The company and its suppliers publicly commit to mitigating negative impacts on biodiversity by addressing key threats (habitat loss, pollution, overexploitation, invasive species, climate change) and setting SMART objectives,
- The company and its suppliers publicly commit to habitat protection, setting SMART objectives.
- The company and its suppliers publicly commit to mitigating negative impacts on biodiversity by addressing key threats (habitat loss, pollution, overexploitation, invasive species, climate

RESULTS

Findings by Domain

Food Losses and Waste



Figure 37. Food losses and waste domain overall score for all the selected companies.

The Figure 37. illustrates the extent to which various companies have implemented initiatives to reduce food loss and waste, expressed as percentages. It is important to note that Spadel was excluded from the evaluation in this domain because they only produce mineral water, and reducing food loss and waste was not relevant to their operations.

In the retail sector, Delhaize shows a strong commitment with a 72% implementation rate. Colruyt follows with 49%, and Carrefour has a 47% rate. Lidl and Aldi display moderate efforts with implementation rates of 44% and 56%, respectively.

In the fast food sector, Pizza hut with 51% followed by Pans 42% have achieved the highest implementation rate for its food loss and waste initiatives. While Mc Donald and Quick demonstrate moderate efforts with rates of 33% each and 33%, Exki and Lunch Garden with rates of 9% and 7% need more efforts in this section.

In soft drink and beverage sector, while Suntory leads with 72% , Coca Cola with the score of 26% needs more efforts for improvement

RESULTS

In the food manufacturing sector, Danone leads with a full 100% implementation rate, reflecting a complete commitment to reducing food loss and waste. Nestle and Unilever follow with a strong 77% each. While the majority of other companies have moderate to high scores vary from 16% to 72%, companies such as Monde Nissin, Casa Tarradellas , Baronie , and Roger & Roger display low to minimal implementation rates, ranging from 0% to 7%.

Overall, the table highlights a diverse range of commitments to reducing food loss and waste across different companies and sectors. Some companies have made significant strides, while others are still in the early stages of their initiatives.

Key recommendation for food losses and waste

- The company and its suppliers annually measure and publicly report their food loss and waste within their supply chain using an external reporting system audited externally,
- The company and its suppliers publicly commit to reducing food loss and waste within their supply chain and that any food waste is disposed of responsibly (following food waste hierarchy), all while setting SMART objectives.

RESULTS

Findings by Domain

Environmental Compliances

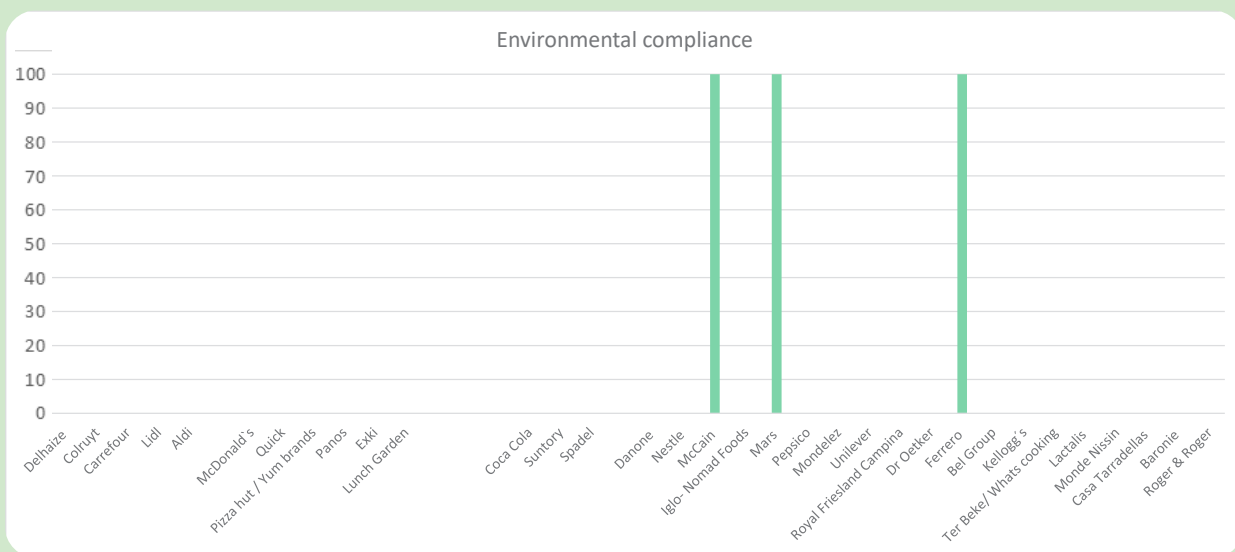


Figure 38. Environmental compliances domain overall score for all the selected companies.

The Figure 38. indicates that the vast majority of companies did not have proof or publicly available declarations that they received no fines or sanctions for non-compliance with environmental laws and regulations. This lack of documentation is reflected by the 0% scores for almost all listed companies.

However, three companies including McCain, Mars and Ferrero did provide the proof and each achieved 100% score, indicating that these companies have verifiable evidence or publicly

Key recommendations for environmental compliances

- Disclose significant fines or non-monetary sanctions due to non-compliance with environmental laws and regulations.

RESULTS

Findings by Domain

Reducing Animal Product

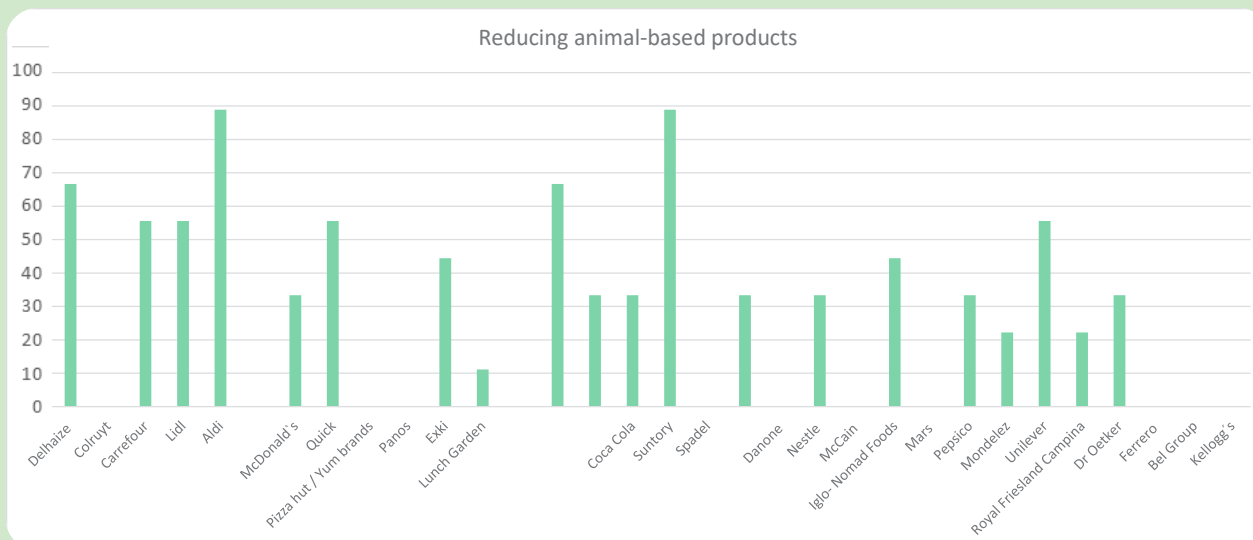


Figure 39. Reducing animal-based products domain overall score for all the selected companies.

The Figure 39. presents data on the efforts of various companies to reduce animal-based products in their offerings, represented as percentages. Notably, companies that are solely soft drink manufacturers, including Coca-Cola, Spadel, and Suntory, were not evaluated for this domain as they do not have animal-based inputs.

In the retail sector, Aldi leads with a 89 implementation rate for reducing animal-based products. While Colruyt has no clear commitment, Delhaize, Lidle and Carrefour show relatively higher scores of more than 50% in this domain.

In the fast food sector, Quick demonstrates significant efforts with a 56% implementation rate. While Exki with 44% and Mc Donald with 33% have moderate scores , Lunch Garden, Pizza hut and Panos show minimal to none engagement with 11% to 0% .

In the food manufacturing sector, Iglo leads with an 89% implementation rate, reflecting strong efforts. Danone follow with rates of 67%, respectively. While some companies show moderate efforts in reducing animal-based products, there are still room for improvements as around half of the selected companies scored 0% in this domain.

RESULTS

Key recommendations for reducing animal-based

- Annually measure and publicly report the percentage of animal-based products in their product range using an external reporting system audited externally,
- Publicly commit to diversifying away from animal-based products with SMART objectives

Findings by Domain

Sustainable Product

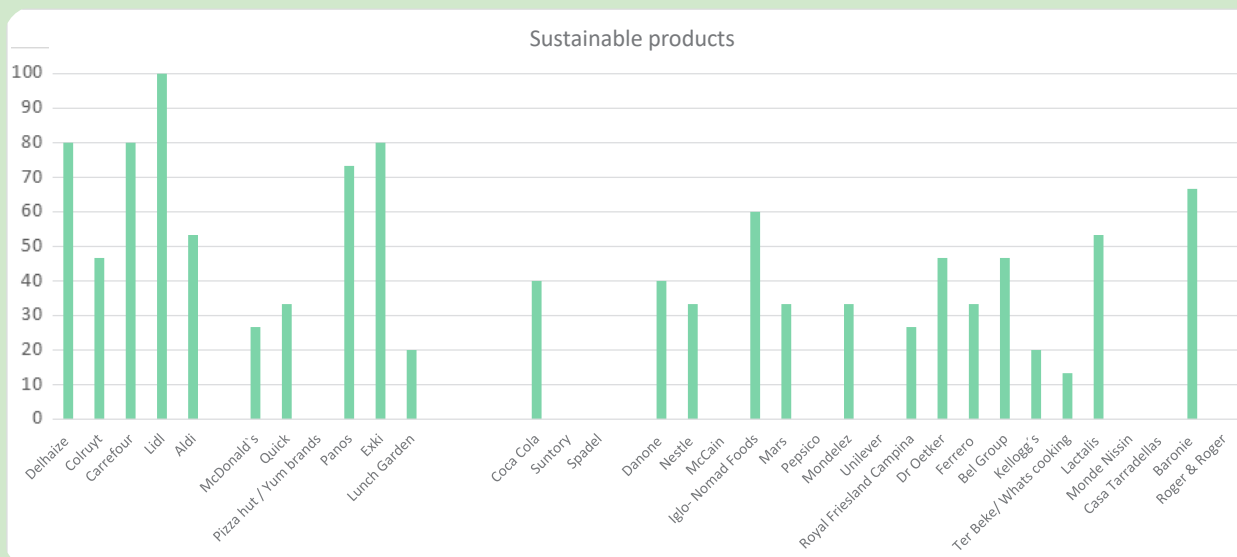


Figure 40. Sustainable products domain overall score for all the selected companies.

RESULTS

The Figure 40. presents data on the implementation of sustainable products by various companies, represented as percentages. Spadel was not included in the assessment for this domain as they only produce mineral water, making sustainable product commitments were less relevant for this company.

In the retail sector, Lidl leads with a full 100% implementation rate for sustainable products. Delhaize and Carrefour show strong commitments with 80% each. Aldi follows with 53%, while Colruyt has a lower rate of 47%.

In the fast food sector, Exki demonstrates significant efforts with an 80% implementation rate. Panos also shows strong progress with a 73% rate. Quick and McDonald's have lower rates of 33% and 27%, respectively. Lunch Garden has a minimal implementation rate of 20%, and Pizza hut shows no engagement with a 0% rate. Coca Cola has a 40% implementation rate for sustainable products, while Suntory has made no progress with a 0% rate.

In the food manufacturing sector, Iglo leads with 60%, followed by Lactalis 53%. The majority of the companies in this sector scored less than 50%, while some show some minimal effort to increase their sustainable and local products, the others have zero to minimum commitments in this domain.

Overall, the table highlights a varied commitment to sustainable products among different companies and

Key recommendations for sustainable products

- Publicly commit to increasing organic product sales with SMART objectives and disclose at least one national initiative to engage customers in organic consumption,
- Publicly commit to increasing labelled commodities in their product range with SMART objectives,
- Publicly commit to increasing local and/or seasonal food in their product range with SMART objectives and disclose one national initiative to engage customers in local product consumption.

LINKING BIA- OBESITY AND BIA- SUSTAINABILITY



This section discusses a comprehensive comparison of the BIA-Sustainability scores alongside the BIA-Obesity overall results for a selection of companies spanning various sectors, including packaged food manufacturers, non-alcoholic beverage manufacturers, supermarkets, and quick service restaurants. This analysis highlights the performance of these companies across multiple sustainability domains and their commitments to obesity prevention and population nutrition. On the whole, the relationship is not consistent. The higher scoring companies in BIA-Obesity often do not get the highest scores in the sustainability domains.

RESULTS

Packaged food and non-alcoholic beverage manufacturers

The table 19. Evaluates the sustainability and obesity prevention efforts of the selected companies across packaged food and beverage manufacturer sector. The results are color-coded to indicate performance levels, with red (lower tertile), orange (medium tertile), and green (upper tertile)¹.

Table 19. The comparison of sustainability and obesity prevention commitments of the packaged food and beverage manufacturers in Belgium.

	Corporate sustainability strategy	Packaging	Emissions	Energy use	Water and discharge	Biodiversity	Food loss and waste	Environmental compliance	Reducing animal-based products	Sustainable products	BIA-Obesity overall result
Coca Cola	100%	83%	100%	100%	71%	60%	26%	0%	N/A	40%	72%
Suntory	100%	58%	82%	86%	51%	53%	72%	0%	N/A	0%	34%
Spadel	40%	34%	78%	25%	69%	38%	N/A	0%	N/A	N/A	N/A
Danone	90%	55%	100%	87%	67%	77%	100%	0%	67%	40%	82%
Nestle	80%	61%	91%	45%	59%	60%	77%	0%	33%	33%	79%
McCain	100%	94%	100%	97%	28%	83%	42%	100%	33%	0%	75%
Iglo	100%	89%	100%	94%	43%	72%	67%	0%	89%	60%	60%
Mars	90%	61%	91%	39%	64%	83%	19%	100%	0%	33%	67%
Pepsico	70%	61%	91%	39%	72%	60%	47%	0%	33%	0%	60%
Mondelez	80%	69%	100%	59%	47%	79%	53%	0%	0%	33%	60%
Unilever	100%	28%	91%	88%	47%	92%	77%	0%	33%	0%	54%
Friesland Campina	90%	27%	71%	62%	10%	83%	0%	0%	0%	27%	48%
Kellogg's	70%	44%	76%	39%	24%	49%	72%	0%	22%	20%	45%
Ferrero	80%	46%	100%	48%	16%	60%	16%	100%	0%	33%	39%
Dr Oetker	70%	41%	58%	38%	0%	49%	58%	0%	44%	47%	35%
Bel Group	90%	58%	91%	71%	35%	87%	51%	0%	33%	47%	31%
Ter Beke /What's cooking	50%	66%	49%	23%	4%	2%	28%	0%	56%	13%	17%
Lactalis	70%	55%	91%	38%	9%	26%	42%	0%	22%	53%	15%
Monde Nissin	50%	27%	44%	42%	19%	9%	7%	0%	33%	0%	15%
Casa Tarradellas	0%	7%	0%	19%	0%	0%	0%	0%	0%	0%	2%
Baronie	40%	45%	7%	22%	0%	0%	0%	0%	0%	67%	2%
Roger & Roger	20%	0%	7%	0%	1%	0%	0%	0%	0%	0%	0%

1 Comparison between BIA- Obesity and BIA- sustainability for Packaged food manufacturers (red -lower tertile, orange -medium tertile, and green-upper tertile)



RESULTS

Coca Cola, Danone, and Nestle stand out as high performers in both sustainability and obesity prevention. Coca Cola achieves complete 100% scores in corporate sustainability strategy, emissions, and energy use, along with high scores in packaging and water and discharge. Its overall BIA-Obesity result is also notable at 74%. Danone excels with high scores across all domains in BIA-Sustainability, achieving particularly impressive results in food loss and waste management (100%), and biodiversity (77%), with a BIA-Obesity score of 82%. Nestle shows strong performance with high scores in emissions (91%), energy use (95%), and food loss and waste (60%), resulting in a BIA-Obesity score of 79%.

Companies such as McCain, Iglo (Nomad Foods), and Mars exhibit moderate performance. McCain scores highly in emissions (94%), energy use (94%), and environmental compliance (42%), and moderate BIA-Obesity score of 75%. Iglo performs well in corporate sustainability strategy (100%), emissions (89%), and packaging (89%), achieving a BIA-Obesity score of 60%. Mars shows strength in emissions (91%) and energy use (91%), resulting in a BIA-Obesity score of 67%.

On the other end of the spectrum, companies like Lactalis Group, Monde Nissin, and Roger & Roger are identified as low performers. Lactalis Group has notably low scores in emissions (40%) and energy use (18%), leading to a BIA-Obesity score of 15%. Monde Nissin scores poorly in energy use (19%) and emissions (44%), with a BIA-Obesity score of 13%. Roger & Roger exhibits low performance across most domains, achieving a BIA-Obesity score of just 2%.

Overall, the table highlights significant variability in the sustainability and obesity prevention efforts among packaged food and beverage manufacturers. Coca-Cola, Danone, Nestlé, McCain, and Iglo stand out with the highest scores across most BIA-Sustainability domains and are also among the leading companies in BIA-Obesity. In contrast, Baronie, Roger & Roger, and Casa Tarradellas require substantial improvements in both BIA-Obesity and BIA-Sustainability to enhance their commitments in these areas.

RESULTS

Quick Service Restaurants

The table 20. Shows the sustainability and obesity prevention efforts of six quick service restaurants: McDonald's, Quick, Pizza hut, Panos, Exki, and Lunch Garden. The results are color-coded to indicate performance levels, with red (lower tertile), orange (medium tertile), and green (upper tertile)¹.

Table 20. The comparison of sustainability and obesity prevention commitments of Quick Service Restaurants in Belgium

	Corporate sustainability strategy	Packaging	Emissions	Energy use	Water and discharge	Biodiversity	Food loss and waste	Environmental compliance	Reducing animal-based products	Sustainable products	BIA-Obesity
McDonald's	100%	75%	91%	86%	17%	60%	33%	0%	33%	27%	32%
Quick	70%	27%	38%	36%	0%	25%	33%	0%	56%	33%	28%
Pizza Hut	100%	77%	87%	71%	65%	64%	51%	0%	0%	0%	20%
Panos	90%	63%	49%	49%	0%	9%	42%	0%	0%	73%	8%
Exki	0%	3%	24%	1%	7%	0%	9%	0%	44%	80%	11%
Lunch Garden	0%	0%	0%	0%	0%	0%	7%	0%	11%	20%	2%

1 Comparison between BIA- Obesity and BIA- sustainability for Packaged food manufacturers (red -lower tertile, orange -medium tertile, and green-upper tertile).



RESULTS

McDonald's stands out as the top performer, achieving 100% in both corporate sustainability strategy and emissions, while also scoring highly in packaging (75%) and energy use (86%). However, its performance is moderate in water and discharge (17%) and biodiversity (60%). Despite these strengths, its overall BIA-Obesity score remains at 32%, indicating room for improvement in obesity prevention efforts.

Quick demonstrates a mixed performance, excelling in corporate sustainability strategy (70%) and reducing animal-based products (56%), but scoring lower in packaging (27%), emissions (38%), and energy use (36%), highlighting key areas for improvement. Its overall BIA-Obesity score is 28%.

Pizza Hut shows a strong sustainability strategy (100%), with high scores in packaging (77%) and emissions (87%). It performs well in biodiversity (65%) but falls significantly short in environmental compliance (0%) and reducing animal-based products (0%). Its BIA-Obesity score stands at 20%.

Panos has a robust sustainability strategy (90%) and moderate scores in packaging (63%) and emissions (49%). However, it performs poorly in water and discharge (0%) and biodiversity (0%), bringing its overall BIA-Obesity score down to 8%.

Exki and Lunch Garden both show weak performance across most domains. Exki scores 0% in corporate sustainability strategy, packaging, emissions, energy use, and several other key areas. Its only moderate score is in reducing animal-based products (44%), resulting in a low BIA-Obesity score of 11%. Lunch Garden also scores 0% in most categories, with minimal progress in reducing animal-based products (11%), leading to the lowest overall BIA-Obesity score at 2%.

Overall, the table reveals significant variability in sustainability and obesity prevention efforts among these quick-service restaurants, with McDonald's leading in most areas, while Exki and Lunch Garden require substantial improvements.

RESULTS

Supermarkets

The table 21. assesses the performance of five major supermarket chains—Delhaize, Colruyt, Carrefour, Lidl, and Aldi—across various sustainability and obesity prevention domains. The results are color-coded to indicate performance levels, with red (lower tertile), orange (medium tertile), and green (upper tertile)¹.

Table 21. The comparison of sustainability and obesity prevention commitments of supermarkets in Belgium.

	Corporate sustainability strategy	Packaging	Emissions	Energy use	Water and discharge	Biodiversity	Food loss and waste	Environmental compliance	Reducing animal-based products	Sustainable products	BIA-Obesity
Delhaize	90%	83%	100%	61%	6%	75%	72%	0%	67%	80%	65%
Colruyt	60%	46%	40%	59%	53%	32%	49%	0%	0%	47%	53%
Lidl	90%	66%	96%	23%	2%	40%	44%	0%	56%	100%	51%
Aldi	60%	61%	82%	41%	17%	53%	56%	0%	89%	53%	42%
Carrefour	60%	72%	100%	77%	31%	85%	47%	0%	56%	80%	41%

1 Comparison between BIA- Obesity and BIA- sustainability for Packaged food manufacturers (red -lower tertile, orange -medium tertile, and green-upper tertile).



RESULTS

Delhaize stands out with strong performance across multiple domains, achieving 90% in corporate sustainability strategy, 83% in packaging, and a perfect 100% in emissions. However, it scores low in water and discharge (6%) and environmental compliance (0%). Despite these shortcomings, it excels in food loss and waste (72%) and sustainable products (80%), resulting in an overall BIA-Obesity score of 65%.

Colruyt demonstrates a mixed performance, with reasonable scores in corporate sustainability strategy (60%) and packaging (46%), but lower scores in emissions (40%), energy use (59%), and environmental compliance (0%). However, it performs better in food loss and waste (49%) and biodiversity (53%), leading to an overall BIA-Obesity score of 53%.

Lidl demonstrates a strong commitment to sustainability, scoring 90% in corporate sustainability strategy, 66% in packaging, and 66% in emissions. However, it receives low scores in water and discharge (2%) and environmental compliance (0%), while excelling in sustainable products with a perfect score (100%). Lidl's overall BIA-Obesity score is 51%.

Aldi presents a balanced performance, achieving 60% in corporate sustainability strategy and 61% in packaging. It performs moderately in emissions (82%) and biodiversity (17%), but does not score in environmental compliance (0%). However, Aldi performs well in reducing animal-based products (89%) and sustainable products (53%), leading to an overall BIA-Obesity score of 42%.

Carrefour exhibits strong performance in several areas, with 60% in corporate sustainability strategy, 72% in packaging, and a perfect 100% in emissions. It also scores highly in biodiversity (85%) and sustainable products (80%). However, it does not score in reducing animal-based products (0%) or environmental compliance (0%), bringing its BIA-Obesity score to 41%.

Overall, the table highlights significant variability in sustainability and obesity prevention efforts among supermarket chains, with Delhaize leading in most areas, while Aldi, Carrefour, and Colruyt show mixed performances and areas needing improvement.

DISCUSSION

This study provides a comprehensive assessment of the commitments and practices of major food companies in Belgium regarding obesity prevention, population nutrition, and environmental sustainability, marking the first such evaluation in the country. The findings reveal significant variations in the overall scores, highlighting both achievements and areas needing improvement across different sectors.

The BIA-Obesity assessment reveals that corporate nutrition strategy is the strongest domain, suggesting that many companies are increasingly integrating nutrition into their broader strategies. However, product accessibility remains the weakest area, indicating the need for stronger efforts. The overall scores range from 0% to 82%, with a median of 40%. Supermarkets and packaged food manufacturers, scoring around 50% and 45% respectively, show more progress, while quick service restaurants lag behind with a median of 15%.

In comparison, the BIA-Sustainability assessment reveals a broad commitment to various sustainability aspects, such as emissions reduction and energy use, with some companies achieving scores as high as 100% in certain domains. However, there are still notable gaps in areas like biodiversity and reducing animal-based products. The median scores for key sustainability domains like packaging, emissions, and energy use were 58%, 87%, and 45% respectively, indicating moderate to high performance, but with room for improvement in making these practices more comprehensive and consistent.

The comparison between the BIA-Obesity and BIA-Sustainability scores highlights some interesting patterns. Companies that scored well in sustainability often also had robust nutrition strategies, suggesting a possible overlap in corporate commitment to both health and environmental goals.

However, the lack of a strong correlation between nutrition and sustainability scores in other companies indicates that efforts in these areas are not uniformly prioritized or implemented. This disparity underscores the need for a more integrated approach where companies align their health and environmental strategies more closely.

DISCUSSION

Comparing the results from 2019 with 2023/2024, there has been noticeable progress in the specificity, comprehensiveness, and transparency of company commitments in both nutrition and sustainability. The overall improvement in scores reflects enhanced strategies and initiatives addressing obesity and promoting healthier products, as well as better sustainability practices. However, some companies have shown stagnation or decline, emphasizing the varying levels of commitment and effectiveness in tackling these issues. This analysis highlights ongoing challenges and the necessity for sustained efforts and regular monitoring to achieve better health and environmental outcomes through corporate responsibility and improved practices.

About 62% of the companies fully engaged with the assessment, and those that did saw significant improvements in their scores. The average score for companies that fully participated was markedly higher than for those that did not engage, demonstrating the value of active involvement in the assessment process. However, some companies found the assessment process burdensome, suggesting a need to explore ways to streamline future evaluations to encourage broader participation.

This study primarily measured commitments and transparency, with limited assessment of performance, mainly related to the healthiness of company portfolios and the extent and nature of unhealthy food marketing to children. Future iterations of the BIA-Obesity and BIA-Sustainability assessments should include a wider variety of performance metrics and track changes over time to better evaluate the impact of company efforts.

In summary, while some Belgian food companies are leading the way with robust commitments and practices in nutrition and sustainability, others need to enhance their efforts significantly. The data underscores the importance of a holistic approach to sustainability and nutrition, encompassing emissions reduction, resource efficiency, biodiversity protection, and compliance with environmental regulations. The company scorecards, available as a separate attachment, allow each company to benchmark their commitments and performance against others in their sector, providing key strengths and recommendations to support further improvements. This ongoing monitoring and evaluation are crucial for driving industry-wide progress and achieving better health and environmental outcomes.

CONCLUSION

CONCLUSION

The comprehensive assessment of food companies in Belgium through the BIA-Obesity and BIA-Sustainability frameworks reveals significant disparities in both nutrition and sustainability commitments and practices across various sectors, including packaged food manufacturers, quick service restaurants, and supermarkets. The findings indicate that while some companies have made considerable strides in implementing robust sustainability strategies and nutrition commitments, others lag significantly behind, highlighting the need for industry-wide improvements.

Packaged food and beverage manufacturers generally show a strong commitment to corporate sustainability strategies and emissions reduction, with median scores reflecting high levels of engagement. However, there is notable variability in other domains such as packaging, energy use, and biodiversity, indicating areas where further efforts are required. The performance in product formulation and nutrition labelling is moderate, suggesting that while progress has been made, there is substantial room for improvement in making healthier products more accessible and better labelled.

Quick service restaurants exhibit a moderate overall commitment to sustainability, with considerable room for improvement in reducing packaging waste, emissions, and energy use. The low median scores for reducing animal-based products and biodiversity efforts underscore the need for these companies to adopt more comprehensive and innovative sustainability practices.

Supermarkets, on the other hand, generally perform better in sustainability practices compared to other sectors, with strong commitments in emissions reduction and sustainable products. However, there are still significant gaps in water and discharge management, as well as biodiversity efforts, pointing to the need for a more holistic approach to sustainability. Overall, while there are leaders within each sector who demonstrate exemplary practices, the wide range of scores across different domains highlights the disparity in commitment and implementation. This underscores the critical need for standardized approaches and enhanced transparency to drive industry-wide improvements in both population nutrition and environmental sustainability. In addition, regulations by governments are strongly recommended to substantially improve food environments in Belgium.

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