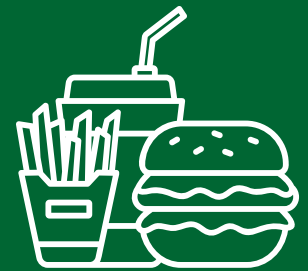


Companies' commitments and practices on population nutrition and environmental sustainability in Belgium 2023/2024

Sector summary: Quick Service Restaurants

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BACKGROUND

Dietary health and environmental challenges in Belgium

Obesity and diet-related chronic diseases, such as cancers, diabetes, cardiovascular diseases, and strokes, are significant public health challenges in Belgium. These health issues lead to substantial economic costs, affecting both the healthcare system and national productivity. A key contributor to these health issues is unhealthy food environments.

Additionally, the food system in Belgium accounts for about 20% of the country's total greenhouse gas emissions, with agricultural production alone contributing 10%. To address these challenges, coordinated efforts from the government, food industry, and society are essential in creating healthier and more sustainable food environments.

This study assessed company commitments and practices related to obesity and population level nutrition (BIA-Obesity) and environmental sustainability (BIA-Sustainability) in Belgium in 2023/2024. This summary highlights the results for the sector of Quick Service Restaurants.





METHODOLOGY

The Business Impact Assessment tool (BIA) evaluates voluntary companies' commitments using various indicators divided into six distinct domains for BIA-Obesity and across ten domains for BIA-sustainability . Each commitment is analysed for its transparency, comprehensiveness, and specificity, and scored according to international criteria. For BIA-Obesity, the scores from all domains are aggregated and weighted to generate a final score out of 100 for each company according to their sectors. For BIA-Sustainability, no weightings are used for the different domains and the scores are presented by domain. Where available, practices are assessed using available data (i.e. Nutritrack to assess nutritional quality of company's products portfolio).

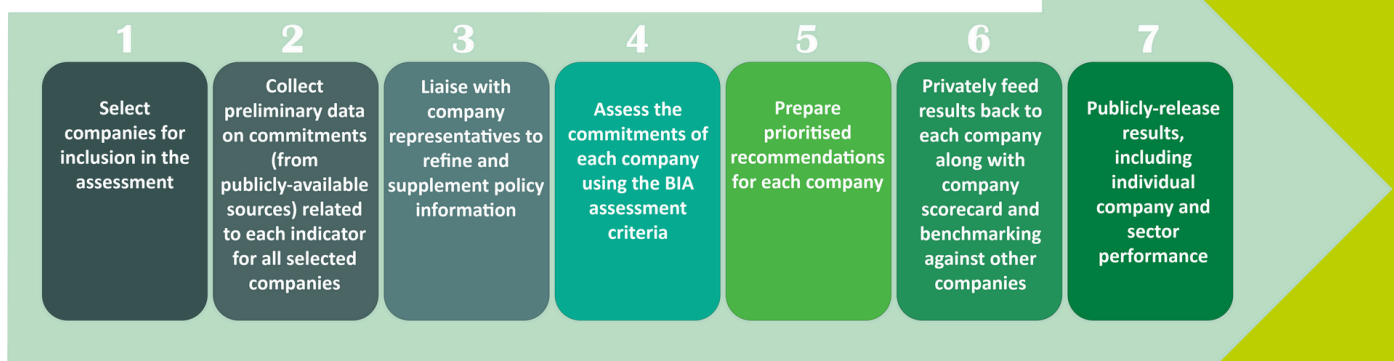


Figure 1. The process for Business Impact Assessment research process

BIA-OBESITY OVERALL RESULT FOR QUICK SERVICE RESTAURANTS

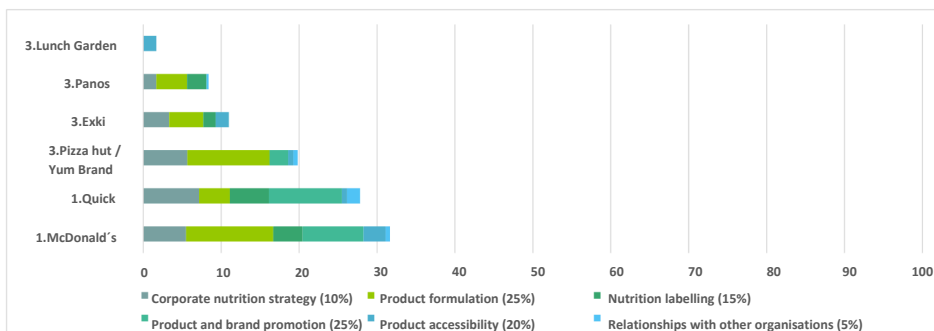


Figure 2. The overall BIA-Obesity results for Quick Service Restaurants in Belgium (Group 1: Full engagement with the process; Group 2: Accepted participation, but contributions not received in time; Group 3: Due to Lack of contact, the assessment of commitments was based on publicly available information only).

Commitments

The median overall score for Quick Service Restaurants was 15% with McDonald's as the top performer with 32%, while Lunch Garden had the lowest score 2% in this sector. Two of the quick service restaurants have fully participated in the process. While, none of the companies actively rejected, for the remaining four companies we were unable to get in touch. These results highlight the varying levels of engagement and commitment among quick service restaurants in addressing sustainability and nutrition-related challenges. Increased participation and transparency from all companies will be essential for driving meaningful progress in this sector.

KEY FINDINGS

Commitments

01

The median score for **Corporate Nutrition Strategy** domain was **44%**, with **Quick** leading at **72%** while **Lunch Garden** scored **0%**.

03

The median score for **Nutrition Labelling** domain was **14%**, with **Quick** leading with **33%** while **Lunch Garden** scored **0%**.

05

The median score for **Product Accessibility** domain was **6%**, with **Mc Donald's** leading at **14%**, while **Panos** scored **0%**.

02

The median score for **Product Formulation** domain was **17%**, with **McDonald's** recording the highest score of **45%**, while **Lunch Garden** scored **0%**.

04

The median score for **Product and Brand Promotion** domain was **5%**, with **Quick** obtaining the highest at **38%** and **EXki, Panos** and **Lunch Garden** scored **0%** with **Quick** obtaining the highest score.

06

The median score for **Relationships with Other Organizations** was **8%**, with **Quick** achieving the highest score of **33%**, while **EXKi** and **Lunch Garden** scored **0%**.

COMPARISON OF BIA-OBESITY OVERALL RESULTS BETWEEN 2019 AND 2023/2024

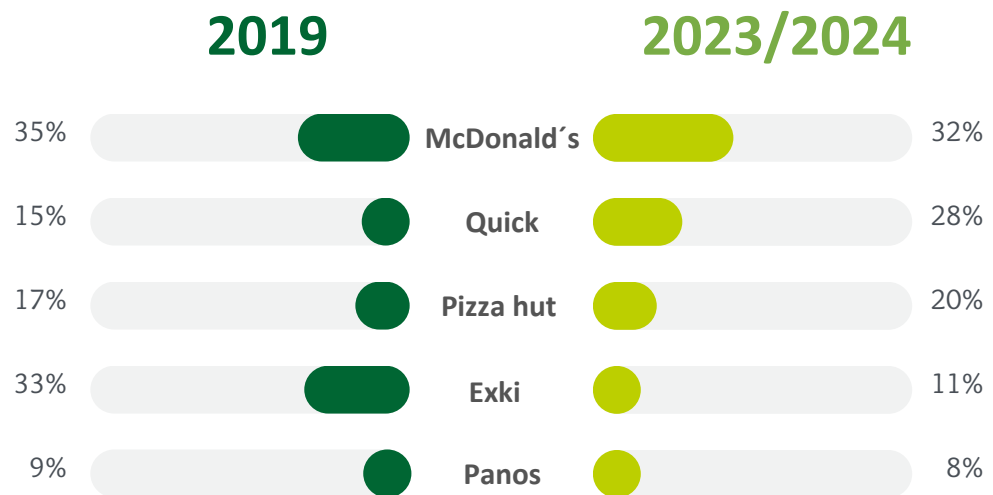


Figure 3. The comparison of commitments' overall score between BIA-Obesity 2023 with BIA-Obesity 2019 for Quick Service Restaurants.

The comparison of BIA-Obesity results for quick service restaurants (QSRs) between 2019 and 2023/2024 reveals varied progress in health and nutrition commitments. Quick showed the most improvement, increasing its overall score from 15% to 28%, driven by advances in corporate nutrition strategy and product formulation. McDonald's maintained relatively stable performance, with a slight decrease from 35% to 32%, but improved in brand promotion and nutrition strategy. Pizza Hut saw a minor increase from 17% to 20%, while Panos remained mostly unchanged, scoring 9% in 2019, and slight decrease in 2023/2024 at 8%, reflecting no progress.

Exki experienced a sharp decline from 33% to 11%, primarily due to a lack of publicly available commitments and inaccessible company representatives. These results highlight the importance of transparency and comprehensive strategies to improve health and nutrition outcomes in the sector.

KEY RECOMMENDATIONS FOR BIA-OBESITY



Corporate Nutrition Strategy

1. SMART nutrition goals, align senior managers' KPIs, and regularly report progress.

Product Labelling

3. Support government menu labelling and provide clear nutrition information in-store and online.

Product Accessibility

5. Support nutrition policies, eliminate sugary drink free refills, increase healthy products availability.

Product Formulation

2. SMART targets to reducing sodium, sugar, and unhealthy fats using nutrient profiling systems.

Product Promotion

4. Eliminate use of promotion techniques and promote only healthy options in children's meals.

External Relationships

6. Disclose and publish national partnerships and political donations or refrain from making them.

BIA-SUSTAINABILITY OVERALL RESULT FOR QUICK SERVICE RESTAURANTS 2023

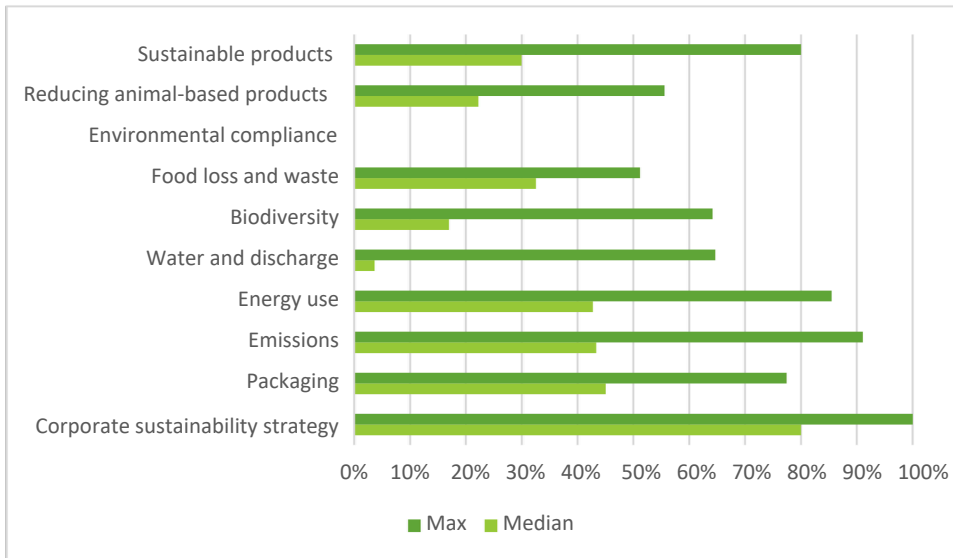


Figure 4. The overall results of BIA-sustainability for Quick Service Restaurants.

The sustainability assessment of quick service restaurants reveals both progress and significant areas for improvement. Corporate Sustainability Strategy leads with a strong score of 80%, demonstrating a notable commitment to integrating sustainability into overarching business practices. Packaging follows at 45%, reflecting moderate efforts to address waste and improve recyclability, while Emissions and Energy Use both score 43%, indicating steady but insufficient progress in reducing greenhouse gas emissions and energy consumption.

Several domains highlight critical gaps. Food Loss and Waste scores 33%, showing some action but leaving room for enhanced measures to minimize inefficiencies. Sustainable Products achieves 30%, while Reducing Animal-Based Products scores 22%, reflecting limited attention to promoting sustainable and plant-based options.

The weakest areas include Water and Discharge Management at 4% and Biodiversity at 17%, signaling a pressing need for more focused efforts. Environmental Compliance, scoring 0%, highlights a complete absence of commitments in this area. To achieve a balanced sustainability profile, quick service restaurants must address these shortcomings while building on their strong strategic framework and moderate progress in packaging and emissions management.

KEY RECOMMENDATIONS FOR BIA-SUSTAINABILITY



Corporate Sustainability Strategy

1. Clear and measurable sustainability goals, full implementation across all domain.

Emissions

3. Specific emissions reduction targets and regularly monitor progress.

Water and Discharge

5. Comprehensive water management practices with measurable conservation goals.

Food Loss and Waste

7. Measurable targets to reduce food loss and waste.

Reducing Animal-Based Products

9. Clear targets to reduce animal-based products in menus.

Packaging

2. Time-bound targets to improve sustainable packaging and reduce waste.

Energy Use

4. Energy reduction targets and investing in renewable energy.

Biodiversity

6. Long-term strategies to enhance biodiversity efforts across all sectors.

Environmental Compliance

8. Transparency by publicly reporting compliance with environmental regulations.

Sustainable Products

10. Promote local and sustainable product offerings.