

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

Sector summary: Supermarkets

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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 supermarkets.



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).

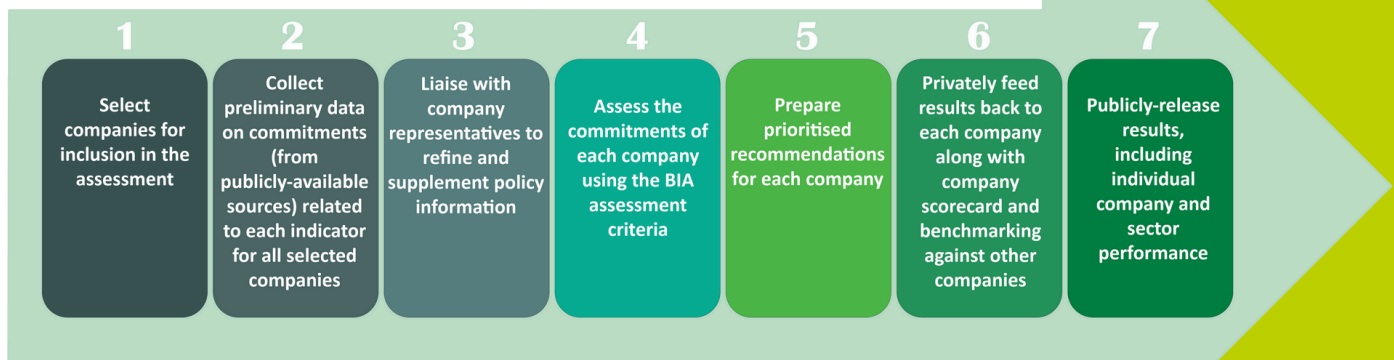


Figure 1. The process for Business Impact Assessment research process

BIA-OBESITY OVERALL RESULT FOR SUPERMARKETS 2023/2024

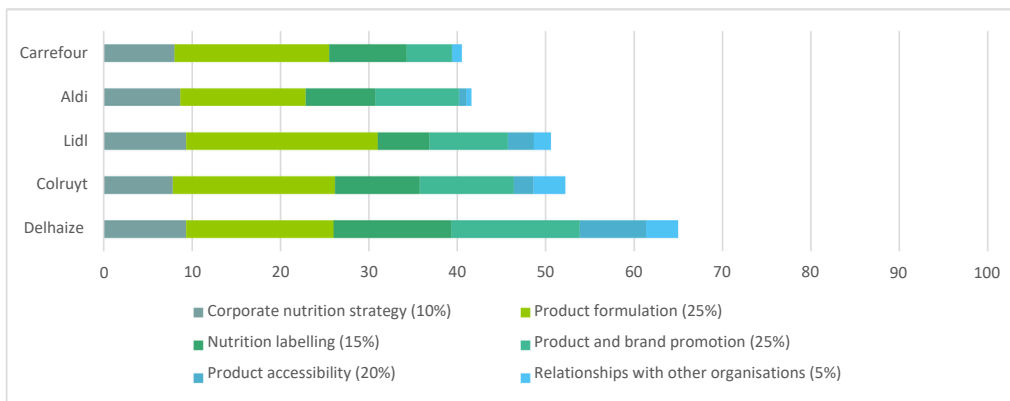


Figure 2. BIA-Obesity overall result for Supermarkets 2023/2024 (All five supermarkets have actively participated in the assessment)

Commitments

Delhaize leads with the highest overall score of 65% %, followed by Colruyt at 53% and Lidl at 51%, while Aldi (42%) and Carrefour (41%) trail behind. Delhaize and Colruyt show strong commitments, particularly in Product Formulation and Corporate Nutrition Strategy, while Carrefour demonstrates lower scores across most domains. The median overall score of 51% indicates a need for substantial improvement across the sector, especially in domains such as Product Accessibility and Relationships with Other Organizations, where commitments remain limited. Notably, while some supermarkets have taken active steps, others show gaps in publicly available commitments in key areas.

KEY FINDINGS

Commitments

01

The best-performing domain is **Corporate Nutrition Strategy**, with a median score of **87%**, led by **Delhaize** at **93%**.

03

In the **Nutrition Labelling** domain, the median score is **58%**, with Delhaize again leading at **89%**.

05

The lowest performing domain is **Product Accessibility**, with a median score of **11%**, while **Delhaize** leads this domain with **38%**.

02

The **Product Formulation** domain has a median score of **70%**, with Lidl scoring the highest at **87%**.

04

Product and Brand Promotion scores are relatively lower, with a median score of **38%**, and **Delhaize** achieving the highest score of **58%**.

06

In the **Relationships with Other Organizations** domain, the median score is **39%**, and **Delhaize** and **Colruyt** both stand out with **72%**.

KEY FINDINGS

Performances

The assessment of supermarkets' product portfolios across various nutrition metrics reveals key differences in performance.

01.

Nutri-Score

Delhaize stands out with the highest proportion of healthier products, having **34%** Nutri-Score A and **22%** Nutri-Score B products, reflecting a commitment to offering healthier choices.

Aldi and **Colruyt** have the highest proportion of Nutri-Score E products, at **9%** and **8%** respectively.

02.

Ultra-Processed Foods

Aldi and **Lidl** have the highest proportion of ultra-processed foods, with **61%** and **63%**, respectively, signaling a need for improvement in reducing processed offerings. **Delhaize** has the lowest proportion of ultra-processed foods (**41%**)

03.

Marketing to Children

Delhaize again leads with **50%** of its products permitted to be marketed to children, whereas **Aldi** and **Lidl** show weaker performance, with only **31%** and **35%** of their products permitted for marketing to children, according to WHO standards.

04.

Commitments vs. Performance

There is a gap between the BIA-Obesity commitments by supermarkets, especially in product formulation and brand promotion, and their actual performance. Strong commitments often failed to result in healthier products or better marketing practices for children.

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

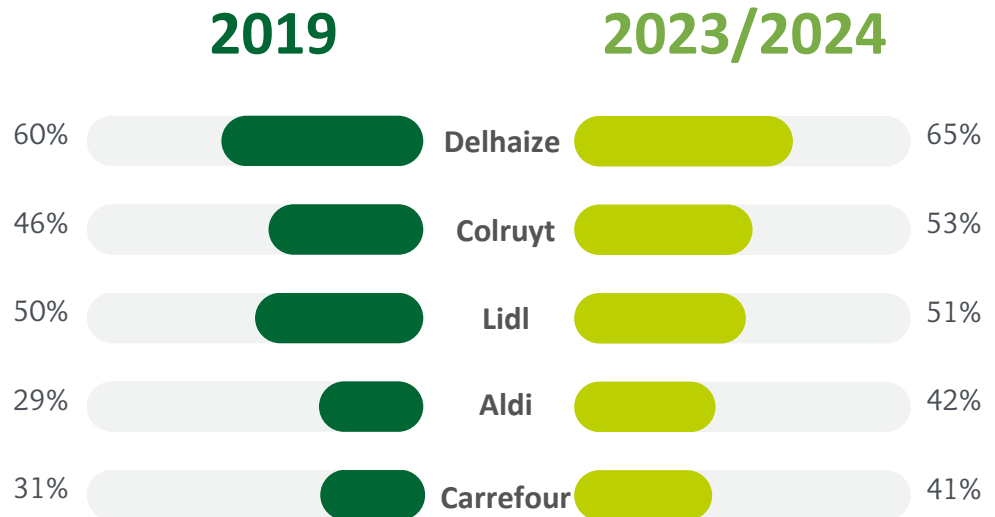


Figure 3. The comparison of commitments' overall score between BIA-Obesity 2023 with BIA-Obesity 2019 for Supermarkets.

Most supermarkets showed improvements in their health and nutrition commitments between 2019 and 2023/2024, with notable advancements in product formulation and accessibility, though corporate nutrition strategies remained largely unchanged. Nutri Score A products increased across all supermarkets, with Delhaize (34%) and Lidl (33%) leading in 2023. Aldi significantly reduced its Nutri-Score E products from 23% in 2019 to 9% in 2023, though it still had the highest proportion. All supermarkets increased the proportion of products permitted to be marketed to children and reduced the proportion of ultra-processed foods and products with Nutri-Score D&E. Aldi decreased its share of not-permitted products from 82% in 2019 to 69% in 2023, while Delhaize (50%) and Carrefour (43%) had the highest shares of permitted products in 2023. These changes highlight overall improvements in promoting healthier food environments.

KEY RECOMMENDATIONS FOR BIA-OBESITY



Corporate Nutrition Strategy

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

Product Labelling

3. Support EU-wide Nutri-Score adoption and ensure clear nutrition labelling in-store and online.

Product Accessibility

5. Support policies like a sugar tax, limit multi-buy deals on unhealthy items, and ensure checkouts are free from unhealthy products.

Product Formulation

Commit to reducing sodium, sugar, and unhealthy fats using Nutri-Score and category-specific benchmarks.

2.

Product Promotion

Limit marketing to children and restrict promotion of unhealthy products in-store and in catalogues.

4.

External Relationships

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

6.

BIA-SUSTAINABILITY OVERALL RESULT FOR SUPERMARKETS 2023

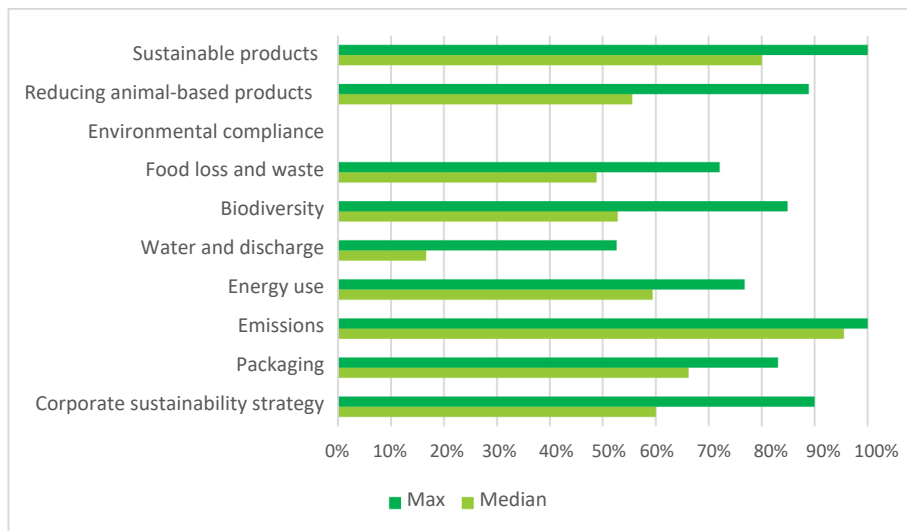


Figure 4. The overall results of BIA-sustainability for Supermarkets

The sustainability assessment of the supermarket sector highlights strong performance in several key areas. Emissions management leads with an impressive score of 96%, showcasing significant efforts to reduce greenhouse gas emissions. Sustainable Products also scores highly at 80%, reflecting a strong focus on offering environmentally friendly options. Corporate Sustainability Strategy and Packaging achieve 60% and 66%, respectively, indicating a solid integration of sustainability into business practices and moderate progress in reducing waste.

Other domains show varied performance. Reducing Animal-Based Products scores 56%, demonstrating growing attention to promoting sustainable alternatives, while Biodiversity reaches 53%, suggesting moderate progress in ecological protection. Energy Use and Food Loss and Waste achieve 59% and 49%, respectively, highlighting areas where more focused action is needed to optimize efficiency and reduce resource wastage.

The weakest areas include Water and Discharge Management, scoring only 17%, and Environmental Compliance, with a critical score of 0%, indicating a lack of commitments in these areas. These findings emphasize the need for supermarkets to build on their strengths in emissions reduction and sustainable products while addressing gaps in water management and compliance to create a more comprehensive sustainability profile.

KEY RECOMMENDATIONS FOR BIA-SUSTAINABILITY

Corporate Sustainability Strategy

1. Commitments to aligning with UNGC/SDG and set measurable targets for screening suppliers

Emissions

3. SMART targets for GHG reduction and participate in CDP Climate benchmarks.

Water and Discharge

5. SMART targets to reduce water usage and improve discharge quality, and join CDP Water initiatives.

Food Loss and Waste

7. Report on food waste reduction following the Food Loss and Waste Protocol.

Reducing Animal-Based Products

9. Reduce animal-based products range and diversify the Plant-based options

Packaging

2. SMART targets to reduce packaging and increase the use of renewable and recycled materials.

Energy Use

4. SMART targets for reducing energy consumption across all operations.

Biodiversity

6. Measure and reduce impacts on biodiversity and engage in CDP Forest benchmarks.

Environmental Compliance

8. Disclose fines or sanctions for non-compliance with environmental laws.

Sustainable Products

10. Set targets to increase sales of organic and sustainably labelled products and promote local/seasonal items.