



Food insecurity in people living with obesity in the UK  
Supporting sustainable and healthy food choices in the retail food environment



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# From research to impact: Using real-world supermarket transaction data to provide insights for policy and practice in the FIO and DIO Food projects

**Michelle Morris**

Professor of Data Science for Food  
University of Leeds



Diet and Health Inequalities



## Funding:

This research was funded through the Transforming the UK Food System for Healthy People and a Healthy Environment SPF Programme, delivered by UKRI, in partnership with the Global Food Security Programme, BBSRC, ESRC, MRC, NERC, Defra, DHSC, OHID, Innovate UK and FSA. WP6 received additional support from IGD (the Institute of Grocery Distribution) through their Social Impact programmes on healthy and sustainable diets.

PI Professor Alex Johnstone,  
University of Aberdeen



Develop solutions to support more sustainable and healthier food choices in the UK retail food environment.



WP1: Co-design of supermarket-based interventions that support people living with obesity and food insecurity to acquire healthy and sustainable food.

WP2: Utilising supermarket transactions and data science to understand the health and sustainability of population diet at scale.

WP3: Implementation of retail strategies to promote healthy and sustainability purchasing in consumers & patients.

WP4: Share project findings for transformative potential.



PI Professor Alex Johnstone,  
University of Aberdeen

Work with early years, people living on a low-income and retailers to generate opportune evidence-based research and commentary that informs diet-related health inequalities policy and practice in the context of the cost-of-living crisis.

**WP5**

**Early years - UK infant food insecurity**

Determine parents' and carers' perceptions of the relationship between their infant feeding practice and household food insecurity.

**Key milestones:**

- Study protocol & ethics approval.
- Recruitment of participants & data generation.
- Complete data analysis.
- Deliver two knowledge exchange workshops.




**WP6**

**Review of HFSS policy on retail purchase patterns**

Analyse store-level supermarket sales data to evaluate the impacts of HFSS product placement legislation and whether these were equitable.

**Key milestones:**

- Study protocol & ethics approval – for sales data analysis, and surveys and interviews.
- Receipt of sales data from retailers.
- Customer and retailer survey data collection.
- Complete data analysis and prepare outputs.
- Stakeholder results workshop.



WP5 provides foundational data on early life nutrition challenges, setting the stage for broader food policy research (WP6).

WP6 offers insights into the impact of policy on dietary choices, complementing WP5 food environment and early nutrition research.


**WP7**

**Knowledge mobilisation**

Maximise the project's impact potential through strengthening stakeholders' engagement and additional knowledge exchange activities.

**Key milestones:**

- Policy briefs.
- In-person workshops with stakeholders.
- Sharing of policy insights with APPG, Westminster.
- Online workshop with IGD.
- Evaluate impact & plan future impact activities.



WP7 communicates the findings from WP5 and WP6 to policymakers, practitioners, and the public.





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1

Learnings from working with industry partners – the Academic-Industry Partnership “AIP” framework

Dr Victoria Jennesson, University of Leeds



2

The retailer perspective on implementing and evaluating interventions to support healthy sustainable food purchasing: challenges and opportunities

Prof Charlotte Hardman, University of Liverpool

3

FIO food - Using supermarket transaction data to estimate environmental sustainability footprints of food and drink purchases, and their interplay with health, demographics and food and drink cost

Dr Emma Wilkins, University of Leeds

4

DIO Food – Using supermarket transaction data to evaluate the impact of the High in Fat, Sugar and Salt (HFSS) legislation on purchases of HFSS products and whether the legislation was equitable

Dr Alice Kininmonth, University of Leeds

5

Non-academic perspective talk: From research to action – cross-collaboration learnings

Hannah Skeggs, IGD

A futuristic digital landscape with glowing blue and orange data streams and server racks. The scene is filled with intricate patterns of light and data, creating a sense of depth and complexity. The overall aesthetic is high-tech and immersive, with a focus on digital connectivity and data processing.

How **DID** you get that data!?



An ESRC Data  
Investment



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# Learnings from working with industry partners: The **A**cademic-**I**ndustry **P**artnership (**AIP**) framework

Dr Vicki Jenneson  
23<sup>rd</sup> March 2026





January 2021



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Investment



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# LIDA announces partnership with Sainsbury's

**Sainsbury's**



Leeds Institute for Data Analytics and Sainsbury's have formalised a strategic partnership to deliver a programme of data intensive research projects in nutrition and health, property analytics, location analytics and e-commerce.

Teams from both organisations will work together on challenges aligned with Sainsbury's Net Zero strategy, which also offer the potential for academic advancement and the opportunity to generate valuable societal insights.

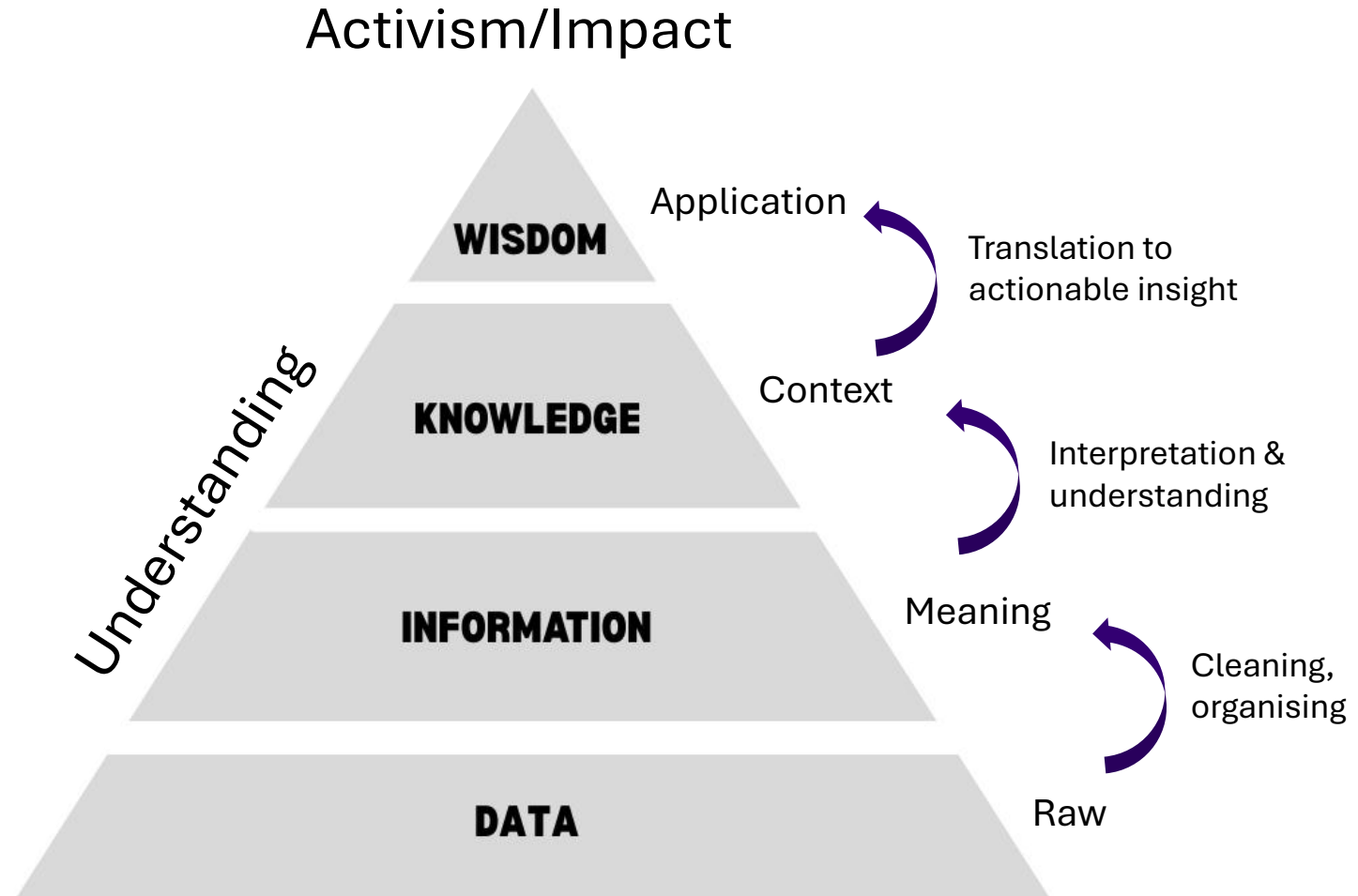
The partnership, which builds on ten years of successful collaboration between the University and Sainsbury's, will formalise working practices and provide associated researchers with access to dedicated virtual research environments.



# The Data Pyramid (DIKW)



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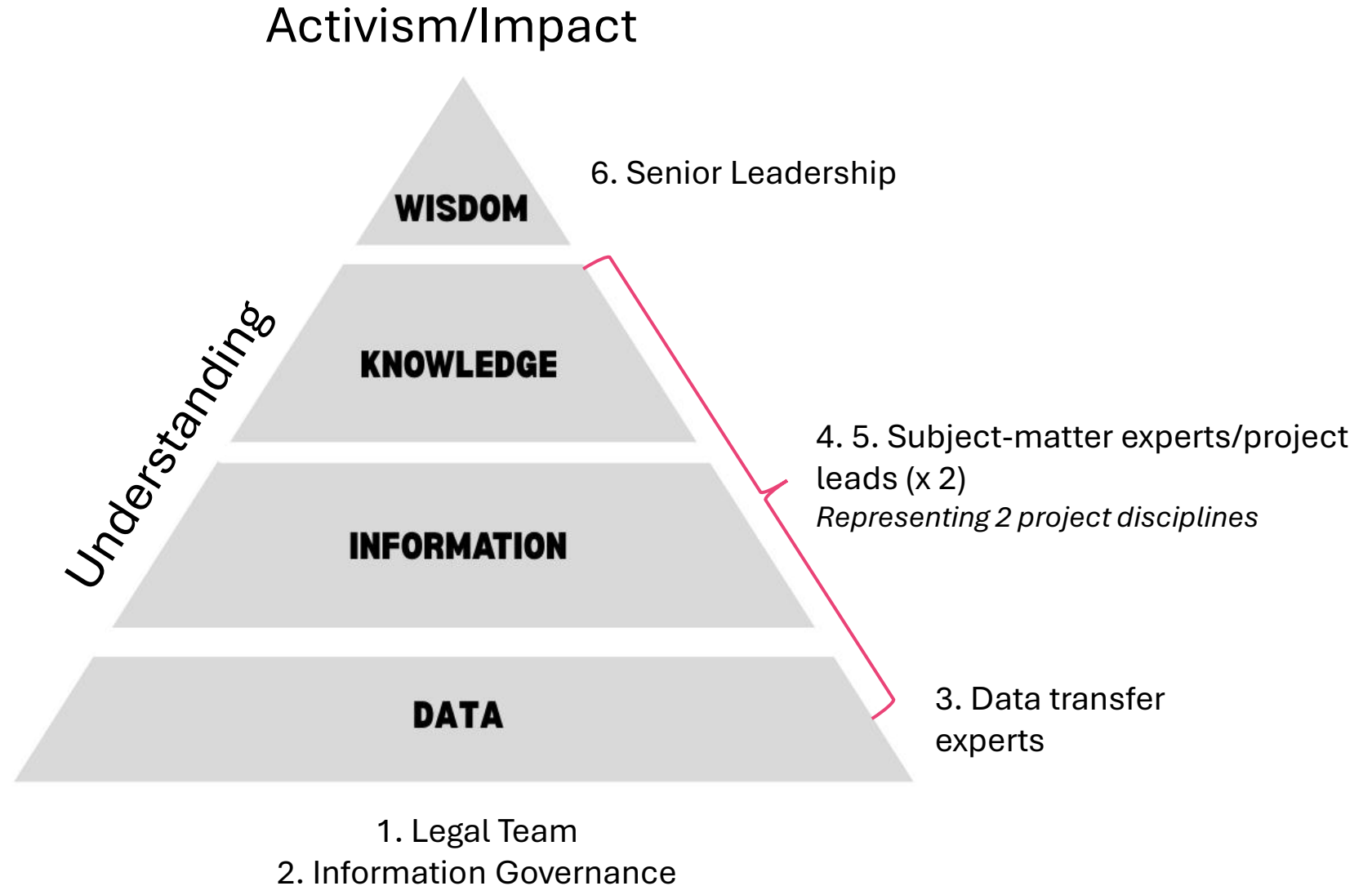




# Participant recruitment

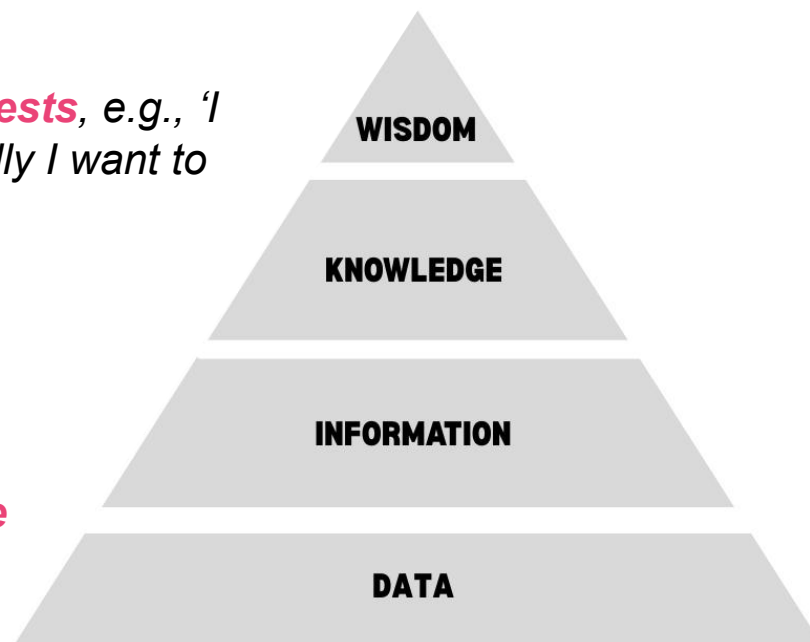


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“There's **often further [data] requests**, e.g., ‘I have looked at the data and actually I want to look at X&Y’”

“With LIDA, it feels like there's a **genuine appreciation of all of the people** around the table and the **expertise** that they bring.”



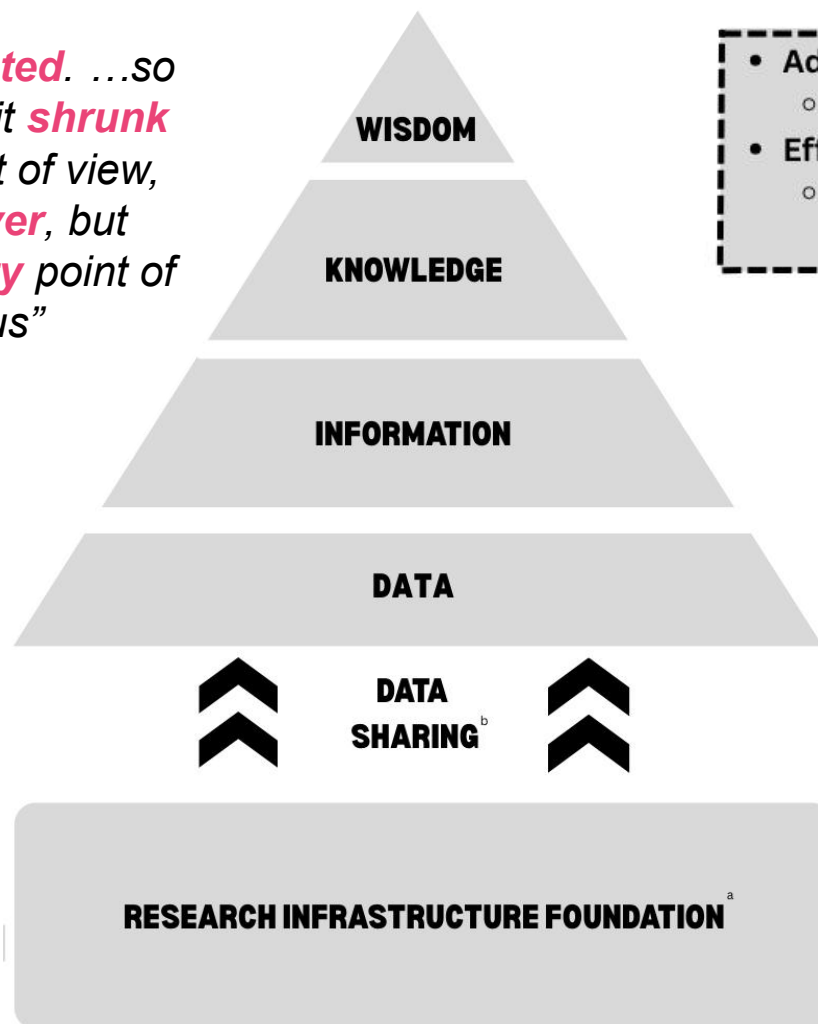
RESEARCH INFRASTRUCTURE FOUNDATION<sup>a</sup>

- **Establish shared goals by:**<sup>e</sup>
  - Aligning objectives upfront; investing time to understand other organisation
- **Creature a culture of co-production by:**
  - Regular communication; foster relationships & value; investing in training/soft skills; diverse teams.
- **Build trust through governance by:**
  - Realising governance is an enabler; investing in IT, process, and procedure; safe researcher training across academia

“So yeah, so all of that stuff **takes time**, takes a lot of, you know **effort**. But **if you don't do it** then then **you don't get the data**”

“We **only got records that we wanted**. ...so each time they put in our criteria in it **shrunk the data**. So, from a technical point of view, there were **less data to come over**, but more from a **commercial sensitivity** point of view that I think that helped us”

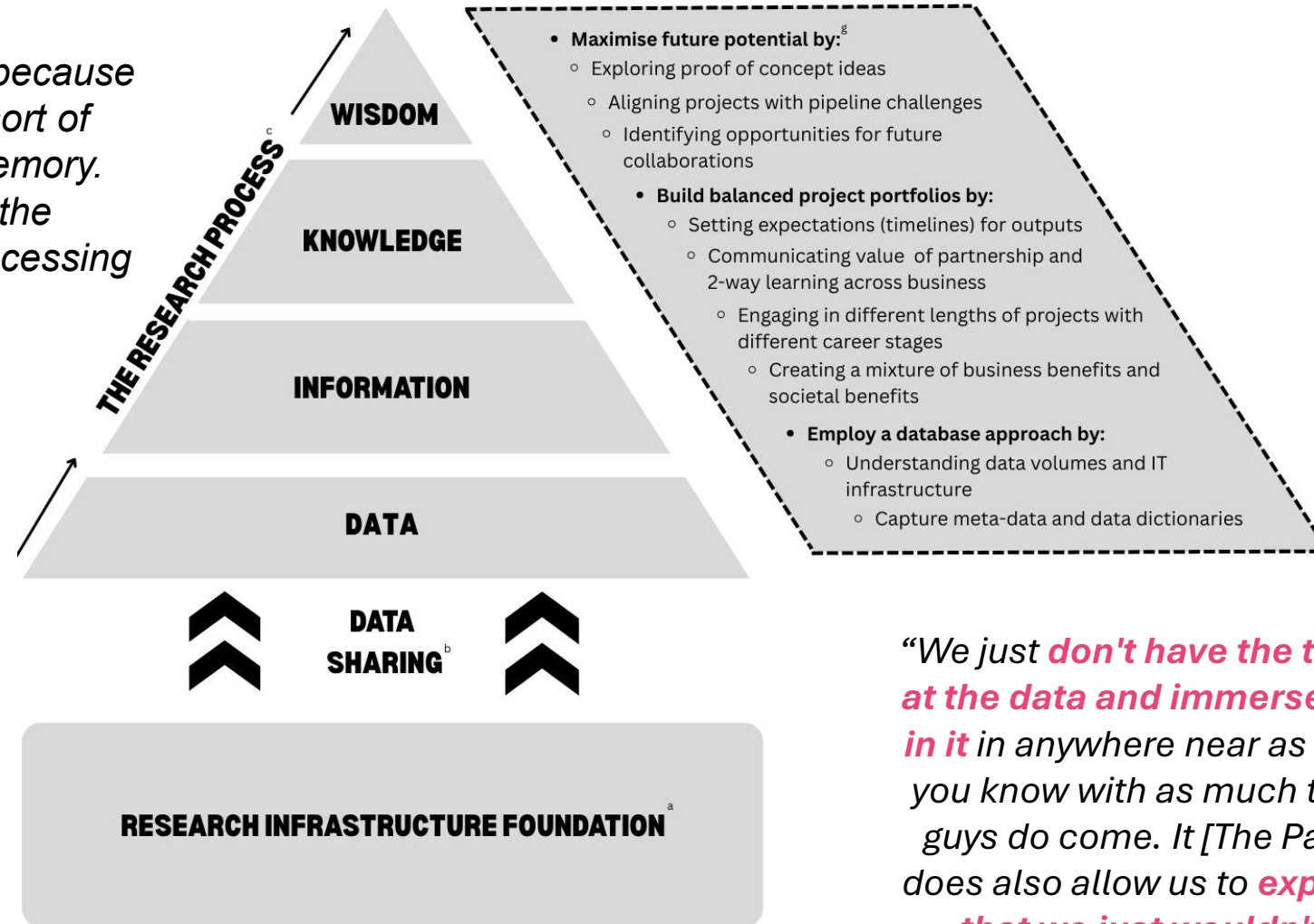
“No one’s gonna say, **‘yeah, help yourself to any data you like’**. That’s not realistic. However, until you’re clear on what it is you want and what you’re trying to prove with it, it’s very difficult to say yes.”



- Adequately scope projects to refine data requests by:<sup>f</sup>
  - Clear asks; data reduction principles; data familiarisation
- Efficient data sharing processes by:
  - Investing in security and support staff; re-assessing and re-defining based on learnings.

“I have to say, other organisations in terms of their data audit process, all that auditing sort of system and security, have been prolonged and lengthy and you know quite tricky to resolve. For our business to feel that **we’re happy to share with LIDA, it’s because you’ve got that expertise.**”

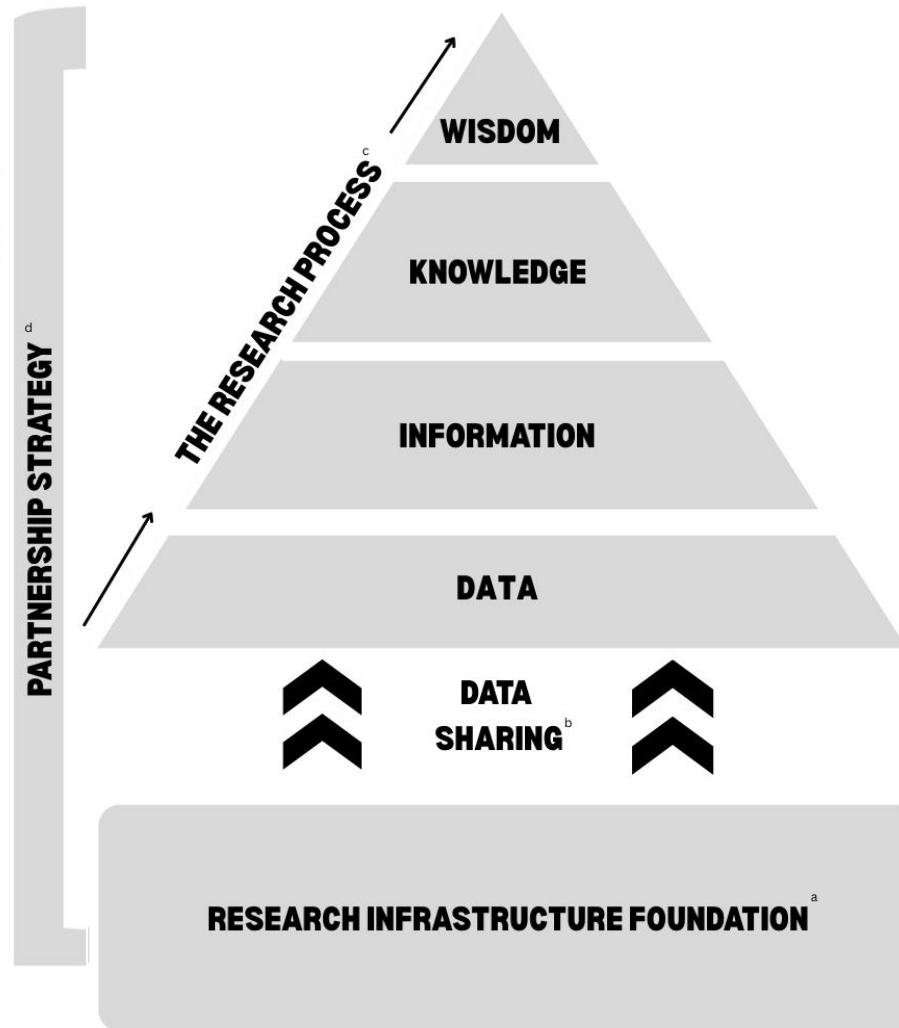
“**Technical challenges** sort of just because of the **volume of the data**, that sort of thing. So, it’s processing out of memory. Uhm, presents a challenge for the researcher to actually code that processing stuff”



“Those associated benefits are not articulated. In most instances **they’re things that the business would want to encourage anyway... They would be building the skills and talents that the business needs in our people for the future**”

“We just **don't have the time to look at the data and immerse ourselves in it** in anywhere near as much time, you know with as much time as you guys do come. It [The Partnership] does also allow us to **explore things that we just wouldn't touch**”

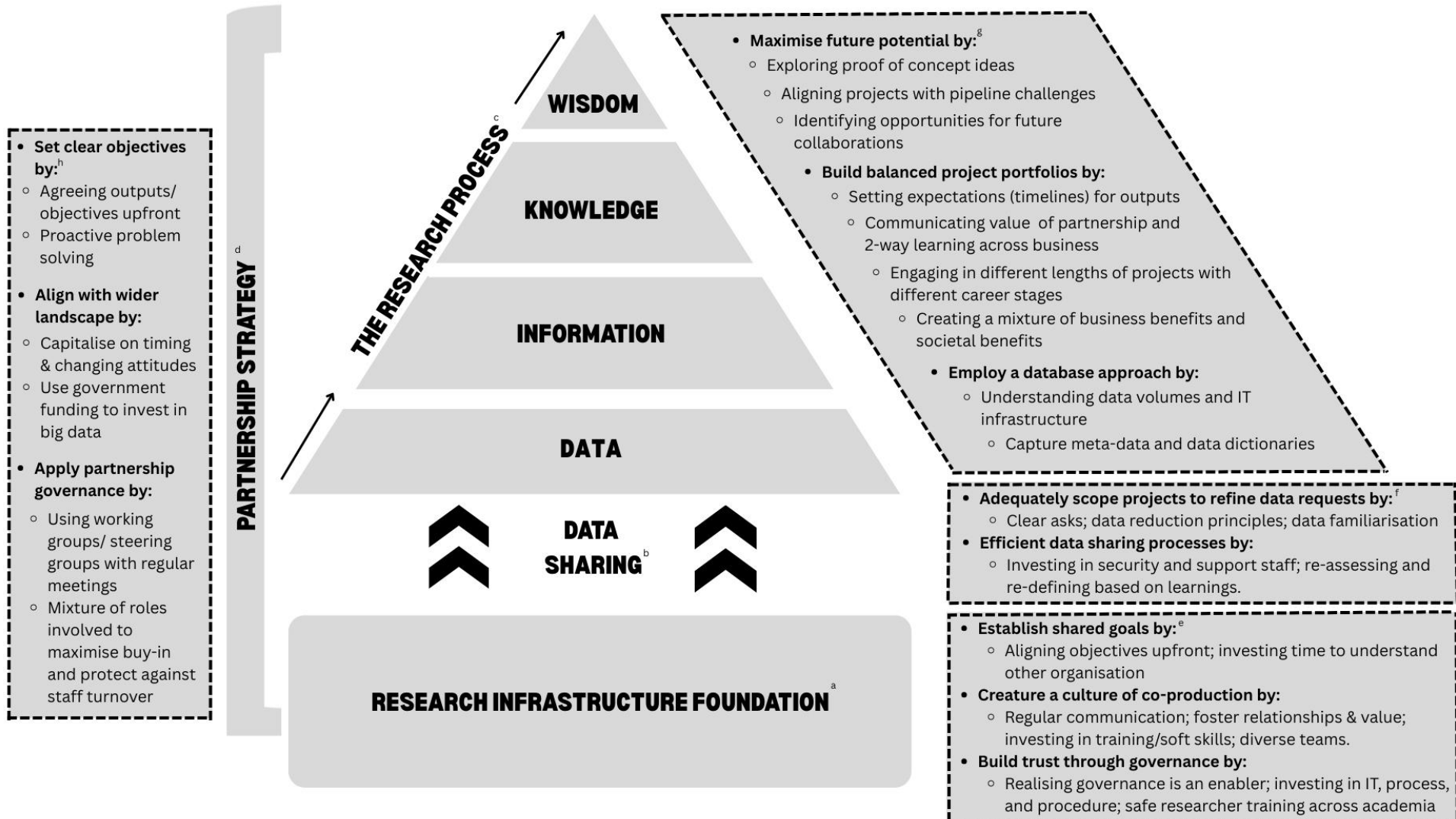
- Set clear objectives by:<sup>h</sup>
  - Agreeing outputs/ objectives upfront
  - Proactive problem solving
- Align with wider landscape by:
  - Capitalise on timing & changing attitudes
  - Use government funding to invest in big data
- Apply partnership governance by:
  - Using working groups/ steering groups with regular meetings
  - Mixture of roles involved to maximise buy-in and protect against staff turnover



“I think is it goes **from more being reactive to something which is more proactive**, based on our strengths and we take a strategic view, and we **focus on a few** of those from a university wide perspective, not a large number, because the **danger is you just dilute out what you are trying to do**”

“There is a general shift in making the most of data... **data sharing is happening more now**. I mean through the **(COVID-19)** pandemic, I think has **accelerated it** as well... to be able to respond to system shock.”

“...from both organisations we've got **multiple individuals involved**. So, if you know if I was to leave or if one person was to leave, then it [The Partnership] would not, you know, it **would continue**”





# Partnership evolution



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**2010(& earlier)**

Property  
Analytics  
projects

**2017**

STRIDE validation  
study & first Big  
Data cut

**January 2021**

LIDA-Sainsbury's  
strategic  
partnership  
formally announced

**2021 - 2026**

Participation in  
FRESH retail trials

**2022 - 2026**

FIO Food project  
&  
DIO Food project

Resource  
dependence  
model

Industry benefit is the  
primary interest, and  
societal issue is secondary

Societal  
sector model

Primary interest is a societal  
benefit, where it aligns to  
business goals



# Application of the **AIP** framework to HFSS study



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## Research Infrastructure Foundation

Individual retailer governance processes

Adequate time for scoping & data sharing sign-off (~8 months) - to ensure 'same' data from all retailers

Cross-retailer protocol sign-off

## Data Sharing

Well-scoped & defined data ask

Regular communication across functions

Dedicated Data Management Support from LIDA

Improved data processing methods and structures

## The Research Process

Common variables & process

Code share between linked Trusted Research Environments

Cross-retailer check-in meetings

## Partnership Strategy

Alignment with policy challenge facing whole food retail sector

Agreed objectives in pre-published protocol (safeguarding academic independence & publication rights)

Communications strategy & sign-off – retailers named but not identified

Cross-retailer meetings in line with competition law



An ESRC Data  
Investment



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The **“AIP”** Framework: Sharing  
Learnings From A Case Study Of  
A Successful Academic Industry  
Data Sharing Partnership  
(OSF Pre-Print)

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23<sup>rd</sup> March 2026

Thank you to co-authors Bec Stone, Emily Ennis,  
Robyn Naisbitt, Nik Lomax and Michelle Morris



# The retailer perspective on implementing and evaluating interventions to support healthy sustainable food purchasing: Challenges and opportunities

Charlotte A. Hardman<sup>1</sup>, Rebecca A. Stone<sup>1,2</sup>, Adrian Brown<sup>3</sup>, Flora Douglas<sup>4</sup>, Hannah Greatwood<sup>2</sup>, Claire Griffiths<sup>2</sup>, Emma Hunter<sup>4</sup>, Alexandra Johnstone<sup>5</sup>, Marta Lonnie<sup>5</sup>, Michelle Morris<sup>6</sup>, Hannah Skeggs<sup>7</sup>

<sup>1</sup>Department of Psychology, University of Liverpool, <sup>2</sup>Obesity Institute, Leeds Beckett University, <sup>3</sup>Centre for Obesity Research, University College London, <sup>4</sup>School of Health, Robert Gordon University, Aberdeen, <sup>5</sup>The Rowett Institute, University of Aberdeen, <sup>6</sup>School of Food Science and Nutrition & Leeds Institute for Data Analytics, University of Leeds, <sup>7</sup>IGD




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Food insecurity: A lack of secure access to sufficient amounts of safe and nutritious food for normal growth and development and an active and healthy life

## Food insecurity in the UK

Robust positive association between **food insecurity** and **obesity**, most notably in adult women in high-income countries



In January 2025, 7.3 million adults were living with food insecurity - 14% of households in the UK.

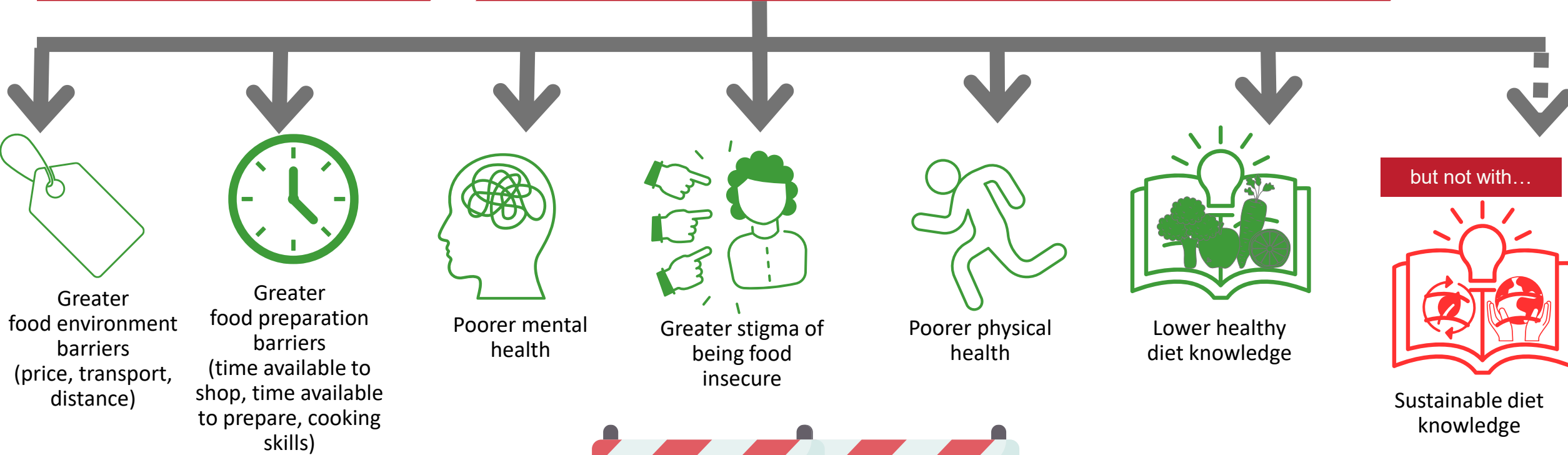


# Barriers to healthy, environmentally sustainable food purchasing in people living with obesity (N = 583)



Food insecurity is associated with...

Barriers to purchasing healthier and more sustainable food in retail settings



# Perceived most and least helpful interventions for supermarkets to increase healthy foods purchasing -according to people living with obesity

Stone, Christiansen, Johnstone, Brown, Douglas, & Hardman (2025). *Food Policy*, 131, 102798, [doi.org/10.1016/j.foodpol.2025.102798](https://doi.org/10.1016/j.foodpol.2025.102798)

Health



## In store

### Top 3 MOST HELPFUL interventions

## Online



- 1 Price discounts on healthy foods(p)
- 2 Personalised money-off promotions (p)
- 3 Rewards on supermarket loyalty card (p)

- 1 Offers/promotions on healthy food (p)
- 2 Rewards on supermarket loyalty card (p)
- 3 Increased stocking and availability (s)



\*Hartmann-Boyce et al. (2018)

### Top 3 LEAST HELPFUL interventions

- 1 Place healthy food in aisle end caps (s)
- 2 Nutrition shelf labelling (a)
- 3 Improved on pack information (a)

- 1 Calories round up of basket (a)
- 2 Recipe inspiration (s)
- 3 Improved healthy labels on products (a)



Behaviour Change Lever \*



(p) = Price/Incentivisation



(s) = Store Environment



(a) = Awareness/Education



This research was funded through the Transforming the UK Food Systems for Healthy People and a Healthy Environment SPF Programme, delivered by UKRI, in partnership with the Global Food Security Programme, BBSRC, ESRC, MRC, NERC, Defra, DHSC, OHID, Innovate UK and FSA.



## Current Aim & Research Question

Aim: To explore the perspectives and views of UK supermarket nutritionists on interventions for healthy sustainable food purchases.

Research question: What are the perspectives, views, and experiences of a range of UK supermarket nutritionists on the acceptability and feasibility of implementing and evaluating affordability interventions for healthy sustainable food purchasing?

# Methodology

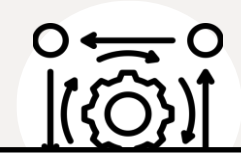
- Recruited senior nutritionists from UK supermarkets.
- Ten supermarkets were approached (98% Grocery Market Share).
- Seven agreed to take part (85% GMS, budget to higher-end retailers).
- Semi-structured interviews conducted online in August-October 2023.
- Interview transcripts underwent thematic analysis → Four themes (with twelve associated sub-themes).



# Theme 1



Health and Susta  
Embedded in Su  
Identity



“So, because it all  
vision, th

“I guess the case with sustainability is that **we as a food industry and as a big retailer have our part to play** in helping to ensure that we have a sustainable future for everyone” **Supermarket A**

“So, we've got a **rich leg**  
one of the first retailers to have any living  
brand - so health has always been a **part of our**  
**DNA**” **Supermarket E**

## Theme 2

“And I think  
**hypothetical**  
**another**  
**in the**

“It [he]  
own b  
**influe**  
produ  
recyclo

“Whilst customers **say that they want healthier choices, they don't necessarily shop in that way**...And the issue is that even when you promote those healthier choices, it doesn't necessarily mean that customers buy more of it” **Supermarket A**

profitability

**comme**

**Superm**

A key element of our... that we're pu... our  
ambition, is to make it profitable and sust... able to make healthy  
choices accessible, because otherwise we can't do it because **we**  
**are a business, it can't be a charitable intervention** because you  
can only support that for a period of time” **Supermarket C**

ected:  
vention Effects  
Messages in

## Theme 3

### Evaluation Challenges and Pursuing

**"I think sometimes there isn't a clear, best practice guide out there of what we should be doing....I suppose it's about bringing research and academic research and the right partners together to help us on that journey"**

Supermarket G

I think we are all in  
many trials  
what's different  
ing to turn the



Illuminating Supermarket Blind Spots: Limitations in Evaluation and Reporting

Collaborating towards a healthier, more sustainable future

## Theme 4

“The **best shortcuts that we have** are things like certification schemes: Responsibly sourced? Fair trade? Because things like that, which are third-party organisations, validate one aspect of the sustainability of a product we could potentially use”

Supermarket A

definition.  
lthy our  
rand

The Complexities of  
Defining and Promoting  
Sustainable Food Choices

Estimating Sustainability  
through Accredited Sourcing  
and Proxy Measures

# Conclusions



Affordability interventions are **complex**. More **nuanced understanding** of food retail environment needed



Supermarkets are in a **paradoxical** situation – commitment and willingness vs. financial, logistical, and behavioural challenges



Further exploration of **collaboration opportunities** across the food retail sector could produce valuable insights to supporting future policy and practice

## Policymakers

- ❖ Ensuring food promoted in supermarkets are in favour of health.
- ❖ Incentivising healthier, more environmentally sustainable retail while mitigating financial risk associated with affordability interventions.
- ❖ Addressing underlying socio-economic factors that contribute to food insecurity.

## Retailers

- ❖ Collaborating with academics and stakeholders to evaluate viable interventions, aligning with public health objectives and economic realities.
- ❖ Stable, sustained low prices on healthy food items, moving away from fluctuating deals/ offers.
- ❖ Mindfulness of the stigma and the often-demoralising experience shopping can be for those living with obesity and food insecurity.

## Healthcare Professionals

- ❖ Sensitive discussions around food insecurity.
- ❖ Understand patient's food environment and the challenges of accessing affordable, healthy foods.
- ❖ Provide practical advice and support with budgeting strategies where appropriate.

# Supermarket nutritionists' perspectives, views, and experiences on affordability interventions to support healthier and more environmentally sustainable food purchasing in UK retail settings

Rebecca A Stone<sup>1,2</sup>, Adrian Brown<sup>3</sup>, Flora Douglas<sup>4</sup>, Hannah Greatwood<sup>2</sup>, Claire Griffiths<sup>2</sup>, Emma Hunter<sup>4</sup>, Alexandra Mary Johnstone<sup>5</sup>, Marta Lonnie<sup>5</sup>, Michelle Morris<sup>6</sup>, Hannah Skeggs<sup>7</sup> and Charlotte A. Hardman<sup>1\*</sup>



[Charlotte.Hardman@liverpool.ac.uk](mailto:Charlotte.Hardman@liverpool.ac.uk)

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### Disclosures (Charlotte Hardman):

Research funding from American Beverage Association (paid to institution); Member of Mars Global Nutrition Advisory Council (honoraria paid to institution); Secondary supervisor on PhD studentship funded by Coca-Cola; Personal honoraria from International Sweeteners Association and International Food Information Council for invited talks; Trustee to Feeding Liverpool (unpaid).

# Harnessing supermarket transaction data to improve population and planetary health

Dr Emma Wilkins

Photo by [Franki Chamaki](#) on [Unsplash](#)



Food Insecurity in people living with Obesity  
Improving sustainable and healthier food choices in the retail FOOD environment

Sainsbury's



RGU ROBERT GORDON UNIVERSITY ABERDEEN



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1/3  
Greenhouse  
Gas  
Emissions  
(GHGE)

70%  
freshwater  
withdrawal

Uses >1/3  
available  
land

Net Zero  
Targets 2050  
=  
Consumer-side  
reductions 15-  
30% GHGE

Increasing  
population =  
50%  
more  
food by 2050



Poor Nutrition:  
£268 billion UK  
annually



2 in 3 adults  
overweight



1 in 3 children  
overweight



40% increase in  
food prices in 5  
years



> 1 in 10  
households food  
insecure

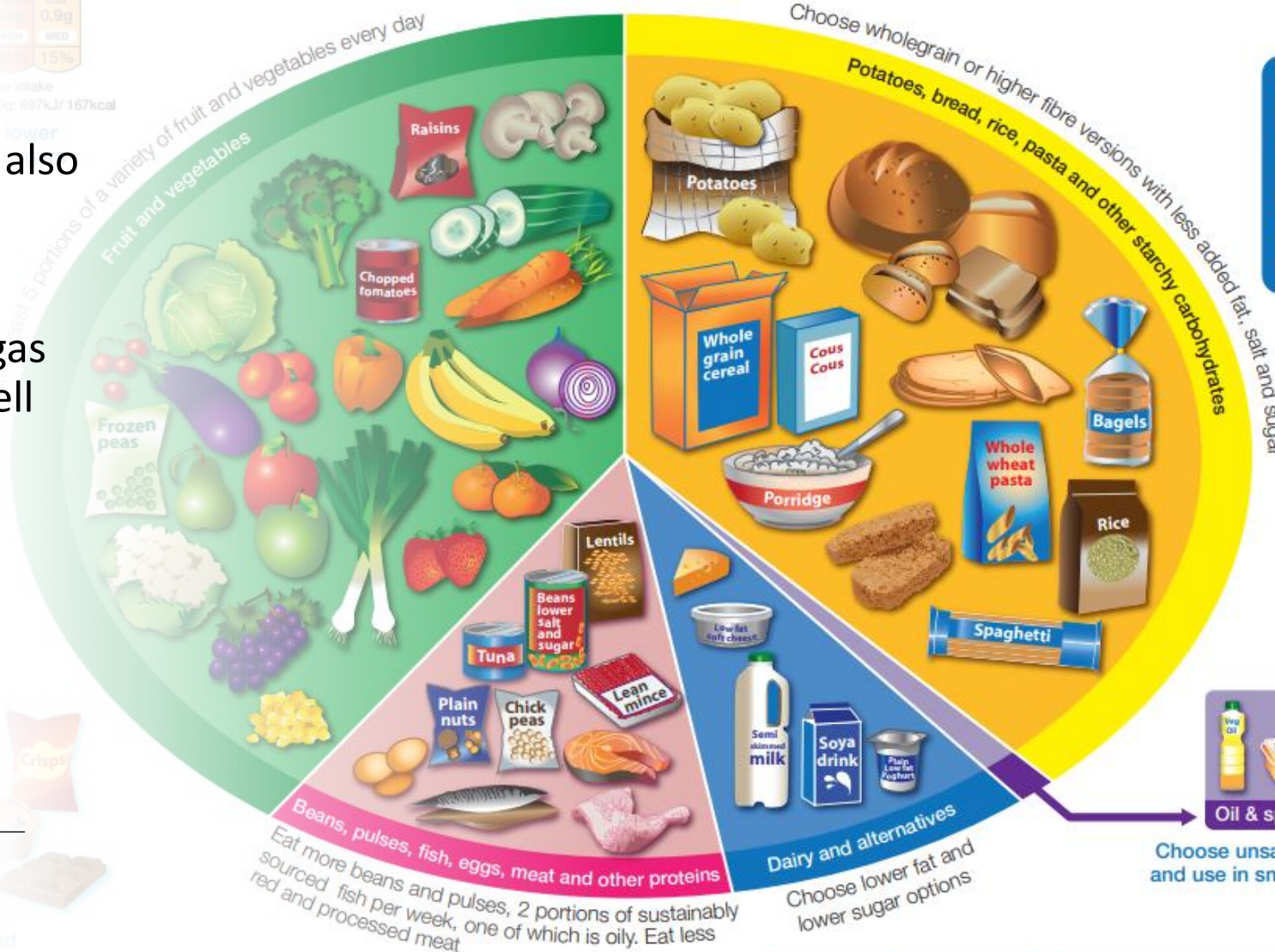
# Eatwell Guide

Use the Eatwell Guide to help you get a balance of healthier and more sustainable food. It shows how much of what you eat overall should come from each food group.



Water, lower fat milk, sugar-free drinks including tea and coffee all count.

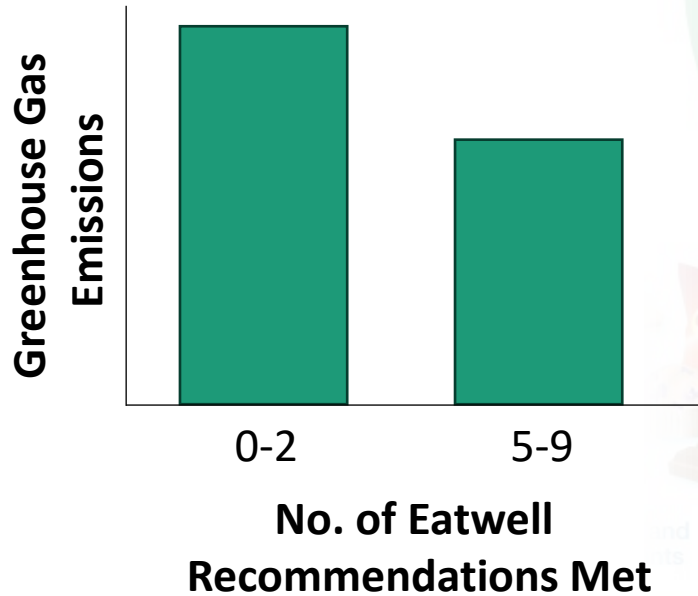
Limit fruit juice and/or smoothies to a total of 150ml a day.



# We know...

Diets that tend to be **healthier** also tend to be **greener**.

**30% reduction** in greenhouse gas emissions by adhering to Eatwell Guide (Scheelbeek et al. 2020)



Label on foods  
contains  
Energy 100g 897kJ/ 167kcal  
Salt 0.9g  
HIGH MED  
15%



Per day 2000kcal 2500kcal = ALL FOOD + ALL DRINKS



<1% meet EW Guidelines

(Scheelbeek et al., 2020)

# Eatwell Guide

Use the Eatwell Guide to help you get a balance of healthier and more sustainable food. It shows how much of what you eat overall should come from each food group.



6-8 a day

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Limit fruit juice and/or smoothies to a total of 150ml a day.

Per day 2000kcal 2500kcal = ALL FOOD + ALL DRINKS



People buy products not diets...

We need a product-level understanding of sustainability and how this interplays with health and cost...

# Supermarket Transaction Data





INTERPLAY

A white line-art icon of a shopping bag with a scalloped top edge and an apple to its left.A white line-art icon of a stack of four coins, with the top one slightly offset to the right.A white line-art icon of a group of ten stylized human figures arranged in three rows: three in the back, four in the middle, and three in the front.

# DATA

## Loyalty Card Transaction Data

Sainsbury's

- 12-months (2022)
- anonymised
- Yorkshire & the Humber, UK
- diverse shoppers (regular visits with purchases across a range of products)

## Product-Level Nutrition Data

- from retailer & Brandbank<sup>1</sup>

## Environmental Sustainability Data

- From Poore & Nemecek<sup>2</sup> global average data on GHGE, Land Use and Water Use for 43 commodities.



# OUTCOMES

## Health Outcome



- HFSS (High in Fat, Salt and Sugar)
- Policy-relevant proxy for health
- 1 = less healthy, 0 = healthier

## Environmental Impact



- Unweighted average of scaled GHGE, Land Use and Water Use.

## Food Cost



- per kg

<sup>1</sup>Based on product data provided by NIQ Brandbank © 2021-22

<sup>2</sup>Poore & Nemecek (2018) Science 360, 987-992

# DATA

## Loyalty Card Transaction Data

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# Results

- 1. Sustainability Footprints**
- 2. Sustainability x Healthiness x Cost**
- 3. Sustainability x Deprivation**

# Results

- 1. Sustainability Footprints**
- 2. Sustainability x Healthiness x Cost**
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# SUSTAINABILITY FOOTPRINTS

Diverse  
shoppers  
in Y&H  
only!



>27,000 products (>160 million sales)



GHGE footprint = 360 million kg CO<sub>2</sub> eq = 6 million tree seedlings over 10 years



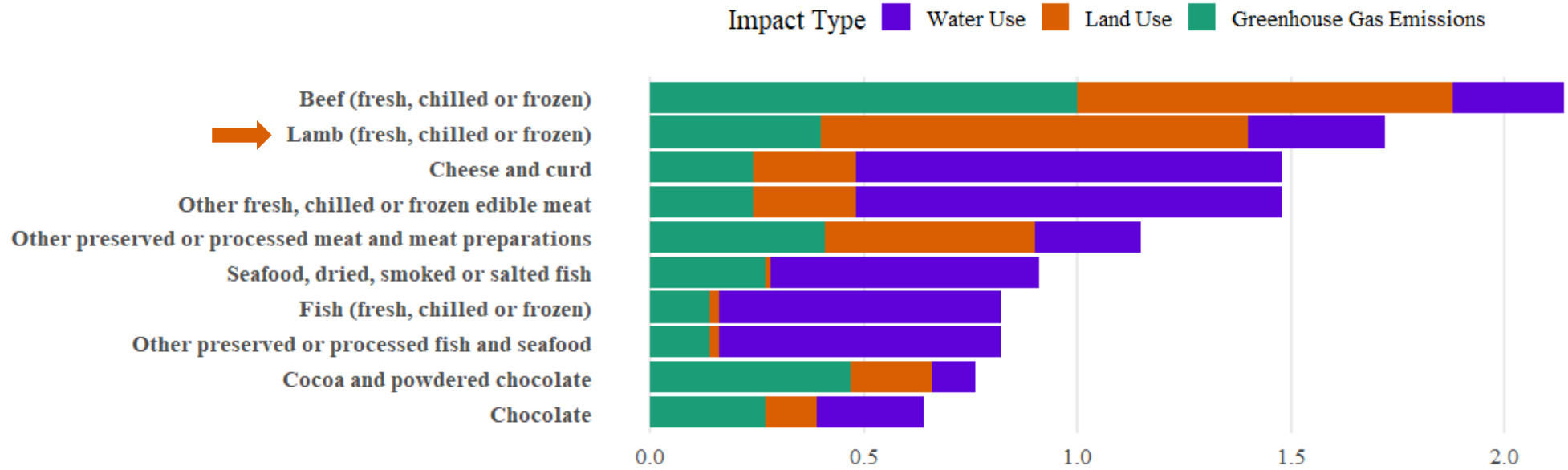
Land use footprint = 930 km<sup>2</sup>.years = 130,000 football pitches



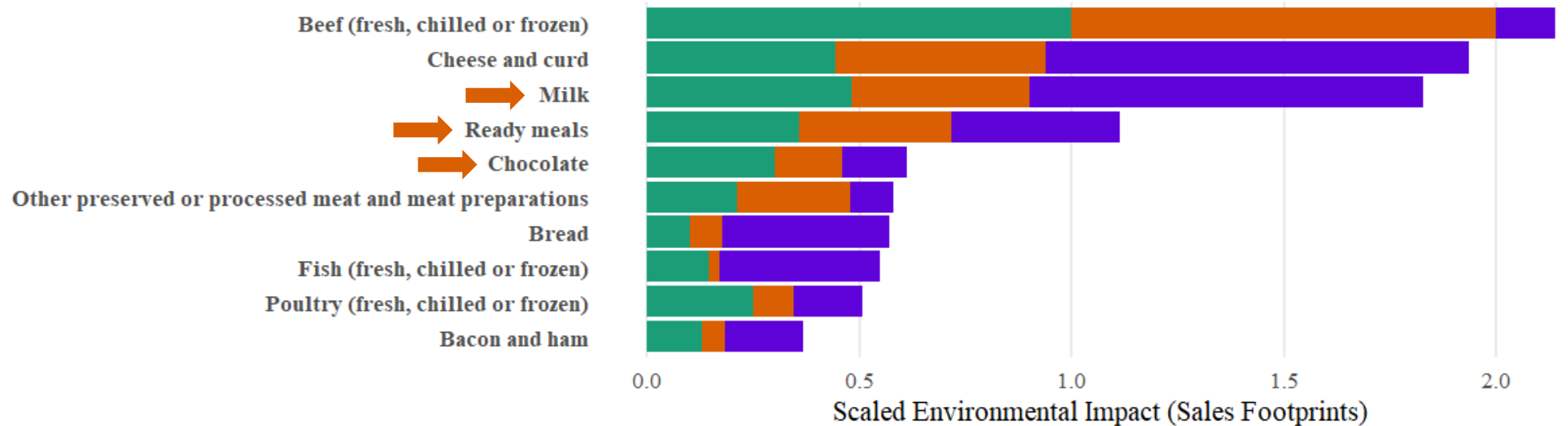
Water use footprint = 46 billion litres = 18 million Olympic swimming pools

# Categories with the largest environmental impact

Per kg



Sales



# Methods Matter

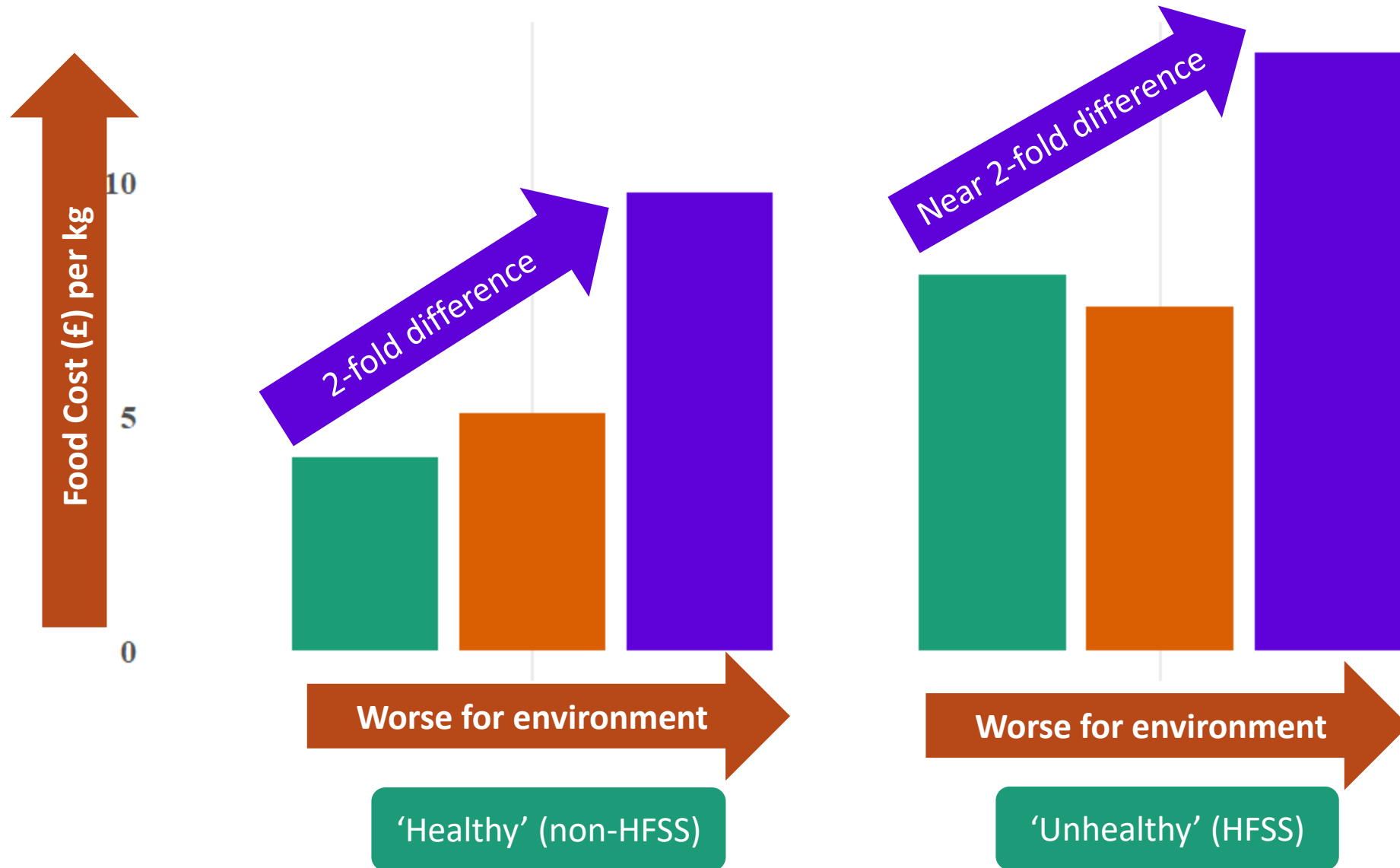
We need multiple lenses to get full picture.

# Results

- 1. Sustainability Footprints**
- 2. Sustainability x Healthiness x Cost**
- 3. Sustainability x Deprivation**

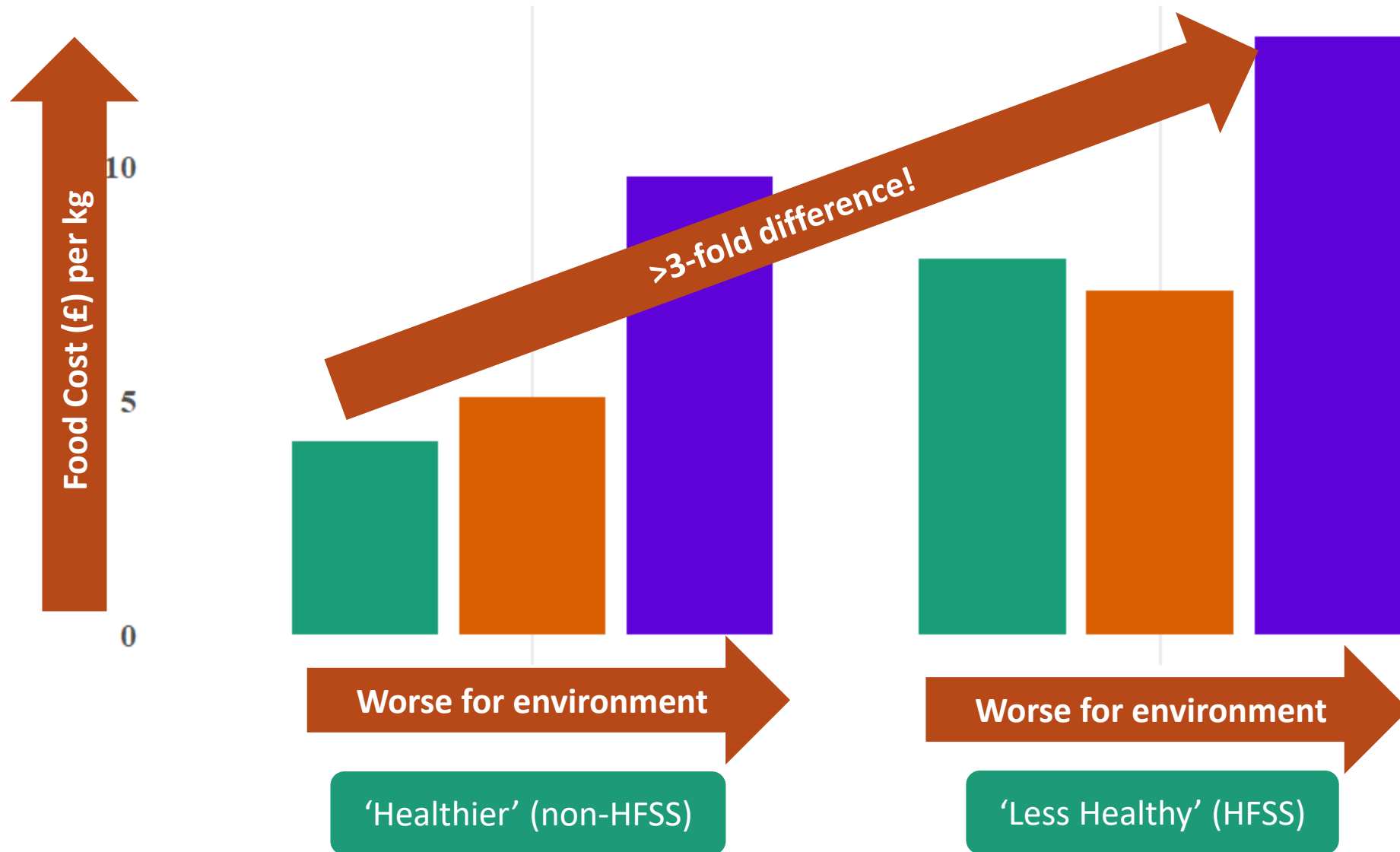
# How do sustainability, health and cost interrelate? (per kg)

Environmental impact per kg ■ Lowest Impact ■ Medium Impact ■ Highest Impact



# How do sustainability, health and cost interrelate? (per kg)

Environmental impact per kg ■ Lowest Impact ■ Medium Impact ■ Highest Impact



Products that are **healthy and low-impact** are considerably cheaper (on average) than unhealthy and high-impact.

Food Category	Sustainable	Healthy	Cheap
Mineral or spring waters	0.16	0	1.19
Soft drinks (inc. fizzy and ready to drink fruit drinks)	0.34	38.1	1.84
Citrus fruits (fresh)	0.39	1.9	2.08
Apples (fresh)	0.43	0	2.43
Fruit and vegetable juices	0.44	12.3	2.33
Potatoes	0.46	6.8	2.4
Root crops, non-starchy bulbs and mushrooms (fresh, chilled or frozen)	0.5	1.4	2.84
Cabbages (fresh or chilled)	0.51	0	3.77
Vegetables grown for their fruit (fresh, chilled or frozen)	0.53	1	4.08
Leaf and stem vegetables (fresh or chilled)	0.53	0	7.27
Fresh vegetables (other)	0.81	10.3	4.83
Preserved fruit and fruit-based products	0.85	5.4	4.25
Bananas (fresh)	0.86	0	1.56
Salt, spices, culinary herbs and other food products	0.89	59	13.19
Dairy alternative	0.98	35	1.75
Dried vegetables	0.98	0	2.21
Other fresh, chilled or frozen fruits	1.05	0	4.13
Stone fruits (fresh)	1.05	2.1	3
Pears (fresh)	1.05	0	2.36
Other preserved or processed vegetables	1.23	30.2	3.68
Savoury snacks	1.43	93.2	11
Berries (fresh)	1.53	0	8.68
Bread	1.57	15.8	3.63
Jams, marmalades	1.6	98.2	5.84
Other breads and cereals	1.64	51.9	5.67

Food Category	Sustainable	Healthy	Cheap
Mineral or spring waters	0.16	0	1.19
Soft drinks (inc. fizzy and ready to drink fruit drinks)	0.34	38.1	1.84
Citrus fruits (fresh)	0.39	1.9	2.08
Apples (fresh)	0.43	0	2.43
Fruit and vegetable juices	0.44	12.3	2.33
Potatoes	0.46	6.8	2.4
Root crops, non-starchy bulbs and mushrooms (fresh, chilled or frozen)	0.5	1.4	2.84
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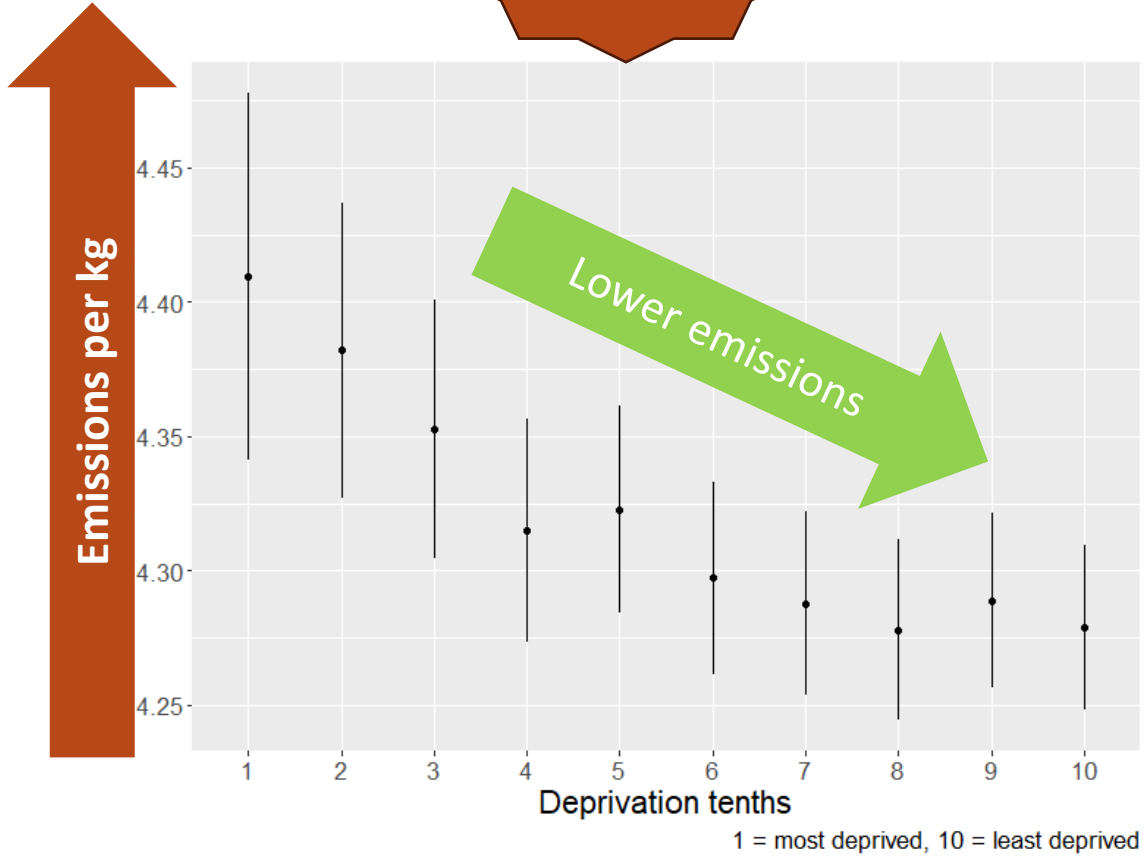
We should prioritise **fruits and vegetables** in our diets for health and environmental sustainability

# Results

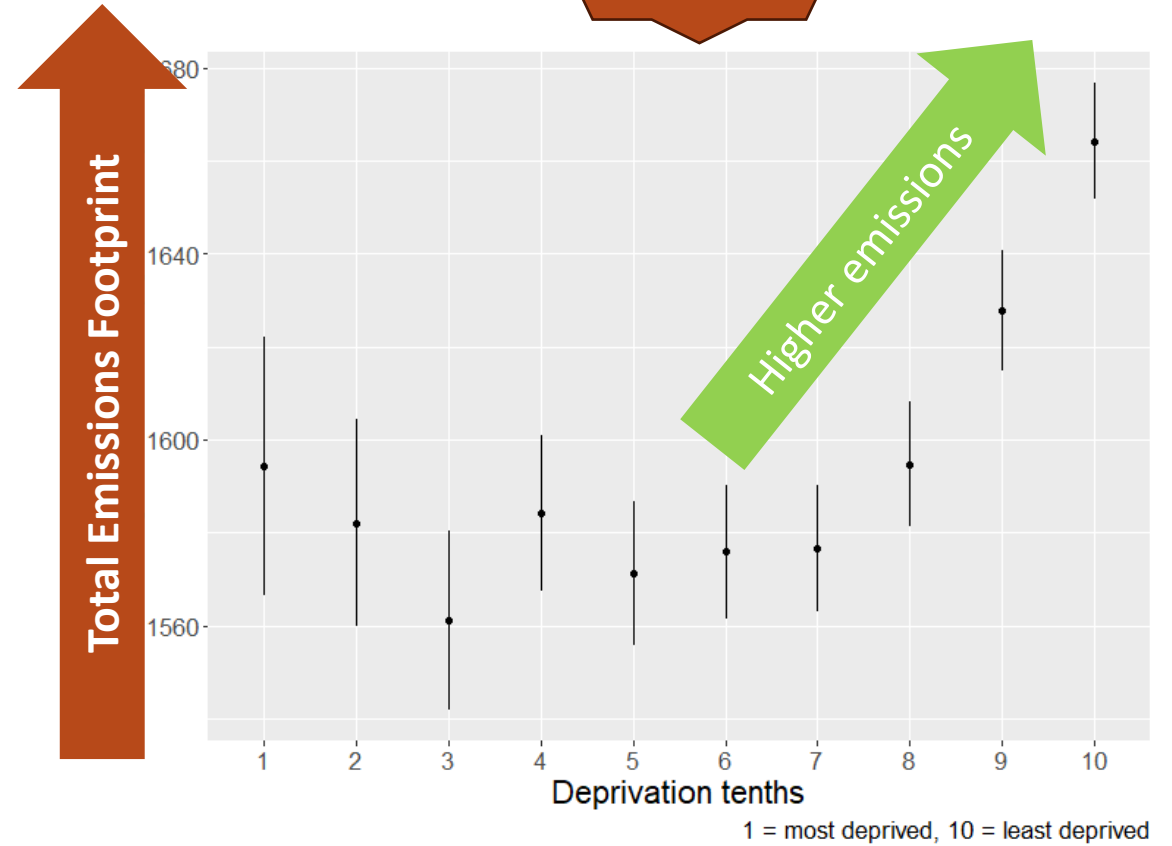
- 1. Sustainability Footprints**
- 2. Sustainability x Healthiness x Cost**
- 3. Sustainability x Deprivation**

# How does sustainable purchasing vary across levels of deprivation?

Emissions per kg



Total Emissions from Sales



Lower levels of deprivation

Lower levels of deprivation

# Deprived

**Purchase foods less sustainable per kg**

--

Healthy & sustainable foods more available/ accessible (£)

# Affluent

**Bigger sales footprints**

--

Higher footprint due to food waste?

Higher % of total purchases at retailer?

# Conclusions – Policy & Industry

## Food Data Transparency Partnership

- **#FoodDataRevolution.** We need per kg and sales footprint measures across detailed food categories, using local and/or product-level estimates.
  - **Make information available** to guide choices – Eco-Labeling?
- Ensure budget and low-cost foods are as sustainable and healthy as possible (**reformulate and offer price discounts**).



	A	B	C	D	E	F	G	H	I
	lcfs_category	subcategory	footprint_m	commc	indicat	weighting_equati	ghge	land_use	water_use
1	Apples (Fresh)	Apples (Fresh)	28	Apples	A30		0.43	0.63	180.1
2	Bacon And Ham	Bacon And Ham	37	Pig Meat	A39		12.31	17.36	1795.8
3	Baker's Yeast, Dessert Preparations, Soups	Soups	104		Tomato Sc	$((A23*0.9)+(A4*0.05)$	2.09	0.96	364.55
4	Baker's Yeast, Dessert Preparations, Soups	Jelly, Mousse, Custards etc.	105		Tiramisu	$((A41*0.5)+((A3+A4$	5.19	15.77	1127.19
5	Baker's Yeast, Dessert Preparations, Soups	Cake Mix	106		Chocolate	$((A46*0.5)+(A3*0.2)$	7.13	9.17	415.22
6	Baker's Yeast, Dessert Preparations, Soups	Cookie/Biscuit Mix	107		Choc Chip	$((A3*0.5)+((A35+A4$	5.51	7.88	514.02
7	Baker's Yeast, Dessert Preparations, Soups	Scone Mix	109		Scone Mix	$((A3*0.5)+(A49*0.2)$	2.48	3.88	360.65
8	Baker's Yeast, Dessert Preparations, Soups	Nut/Seed/Veg Powders	12		Nuts	A14	0.43	12.96	4133.8
9	Bananas (Fresh)	Bananas (Fresh)	27	Bananas	A29		0.86	1.93	114.5
10	Beef (Fresh, Chilled or Frozen)	Beef (Fresh, Chilled or Frozen)	34	Bovine Meat (Beef He	A36		99.48	326.21	1451.2
11	Berries (Fresh)	Berries (Fresh)	29	Berries & Grapes	A31		1.53	2.41	419.6
12	Bread	Bread (Plain)	1	Wheat & Rye (Bread)	A3		1.57	3.85	647.5
13	Buns, Crispbread and Biscuits	Sweet Biscuits - Without Chocolate	143		Custard C	$((A3*0.5)+(A46*0.25)$	3.24	3.01	430.08
14	Buns, Crispbread and Biscuits	Sweet Biscuits - Chocolate Containing (e.g. Chocolate Cookie)	144		Chocolate	$((A46*0.5)+(A3*0.2)$	7.28	9.77	456.47
15	Buns, Crispbread and Biscuits	Crackers, Savoury Biscuits & Rice Cakes	145		Cream Cre	$((A3*0.8)+(A19*0.2)$	2.72	3.56	519.28
16	Buns, Crispbread and Biscuits	Free-From' Savoury Biscuits & Rice Cakes	111		Gluten-Fre	$((A6*0.7)+(A42*0.2)$	6.96	23.15	1469.83
17	Buns, Crispbread and Biscuits	Bun/Crispbreads/Biscuits - Other	56	Cakes/Buns/Biscuits	AVERAGE(A3,A10,A1		1.06	1.09	63
18	Buns, Crispbread and Biscuits	Bun/Crispbreads/Biscuits - Sweet Coated Nuts/Seeds	149		Sesame S	$((A14*0.5)+((A4+A3)$	0.66	7.33	2175.15
19	Butter	Butter	39	Milk	A41		3.15	8.95	628.2
20	Butter	Lard	37	Pig Meat	A39		12.31	17.36	1795.8
21	Cabbages (Fresh or Chilled)	Cabbages (Fresh or Chilled)	24	Brassicac	A26		0.51	0.55	119.4
22	Cakes And Puddings	Cakes/Sweet Bakery Item (Non-Pastry) - With Chocolate	151		Chocolate	$((A46+A35+A41)/3)$	13.41	21.4	636.47
23	Cakes And Puddings	Cakes/Sweet Bakery Item (Non-Pastry) - Without Chocolate	175		Jam And C	$((A3*0.5)+(A41*0.2)$	2.1	5.06	558.44
24	Cakes And Puddings	Cakes/Sweet Bakery Item (Non-Pastry) - Biscuit Containing	179		Bakery Ch	$((A3*0.5)+((A49+A4$	6.35	10.37	453.12
25	Cakes And Puddings	Puddings, Desserts, Sweet Tarts	176		Egg Custa	$((A41*0.5)+(A3*0.2)$	3.31	6.72	580.41
26	Cakes And Puddings	Cakes/Puddings - Morning Goods (e.g. Pancakes, Scones, Waffles) without Additions	178		Plain Pan	$((A3*0.5)+(A46*0.3)$	2.32	4.03	570.01
27	Cakes And Puddings	Cakes/Puddings - Morning Goods (e.g. Pancakes, Waffles) with Additions	177		Sweet Pan	$((A3*0.5)+(A46*0.2)$	2.8	4.08	528.76
28	Cakes And Puddings	Sweet Pastries	76		Sultana Sc	$((A3*0.5)+(A31*0.2)$	4.11	12.98	1093.83
29	Cakes And Puddings	Cakes And Puddings - Other	181		White Cho	$((A46*0.5)+(A43*0.2)$	3.5	3.64	441.67
30	Cheese And Curd	Cheese And Curd	40	Cheese	A42		23.88	87.79	5605.2
31	Chocolate	Chocolate (Milk & White)	186		Milk Choc	$((A41*1.9)+(A46*0.5)$	26.63	45.8	1619.91
32	Chocolate	Chocolate (Dark)	33	Dark Chocolate	A35		46.65	68.96	540.6
33	Citrus Fruits (Fresh)	Citrus Fruits (Fresh)	26	Citrus Fruit	A28		0.39	0.86	82.7
34	Cocoa And Powdered Chocolate	Cocoa And Powdered Chocolate	33	Dark Chocolate	A35		46.65	68.96	540.6
35	Coffee	Coffee	32	Coffee	A34		28.53	21.62	25.9
36	Confectionery Products	Chocolate Confectionery - Biscuit/Wafer	146		Chocolate	$((A46*0.5)+(A3*0.2)$	7.1	10.18	468.04
37	Confectionery Products	Chocolate Confectionery - Without Biscuit/Wafer	186		Milk Choc	$((A41*1.9)+(A46*0.5)$	26.63	45.8	1619.91
38	Confectionery Products	Confectionery - Sweets	200		Flavoured	$((A3+A4)/2)*0.7)+($	2.88	4.5	565.48

# Acknowledgements...

## Core Team



Prof Michelle Morris



Prof Mark Gilthorpe



Prof Mark Green



Dr Mariana Dineva

## FIO Food Team



Food Insecurity in people living with Obesity  
Improving sustainable and healthier food choices in the retail FOOD environment

Linkage  
Method



Look-Up  
Tool



This work was part of the FIO-Food project, funded through the Transforming the UK Food System for Healthy People and a Healthy Environment SPF Programme, delivered by UKRI, in partnership with the Global Food Security Programme, BBSRC, ESRC, MRC, NERC, Defra, DHSC, OHID, Innovate UK and FSA.

# DIO-Food - Using supermarket transaction data to evaluate the impact of the High in Fat, Sugar and Salt (HFSS) legislation on purchases of HFSS products and whether the legislation was equitable

Dr Alice Kininmonth

23<sup>rd</sup> March 2025



**Funding:**

This research was funded through the Transforming the UK Food System for Healthy People and a Healthy Environment SPF Programme, delivered by UKRI, in partnership with the Global Food Security Programme, BBSRC, ESRC, MRC, NERC, Defra, DHSC, OHID, Innovate UK and FSA. WP6 received additional support from IGD (the Institute of Grocery Distribution) through their Social Impact programmes on healthy and sustainable diets.

## The restrictions on the placement of HFSS (high in fat, sugar or salt) products in stores and online came into force in England in October 2022

### Which products are in scope?

Pre-packaged foods that are within the 13 in scope categories and defined as high in fat, sugar and salt by the 2004/5 UK Nutrient Profiling Model

### Who does the legislation apply to?

The legislation applies to businesses with over 50 employees both instore and online.

Specialist Retailers such as chocolatiers, confectioners, and cake shops are exempt from location restrictions. Stores with a square footage of <2,000 are exempt from the location restrictions

### Which areas are restricted?

In scope HFSS products cannot be placed in check out areas, end of aisles and entrances to physical stores, as well as their online equivalents.

### Who is liable and who carries out enforcement?

Businesses are responsible for ensuring compliance with the regulations. This includes proper placement of HFSS products both in-store and online.

Local authorities are responsible for enforcing the HFSS regulations.



# Ways of working in this project



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The Nutrition and Lifestyle Analytics team at the University of Leeds, led by Professor Michelle Morris are the research experts. Their rigorous, academic analysis ensures any results are credible and independent from the businesses we work with. The teams' expertise span nutrition and data science, meaning they can effectively manage, analyse and interpret food data.



In this research, four retailers signed up to share large scale data and to support the analysis, as well as participating in retailer interviews and surveys, alongside BRC and trading standards.



IGD bring the food system perspective. Through our forums, networks and impact work we understand how industry operates. We connect industry, academia and government, helping translate academic research into industry relevant resources that drive action

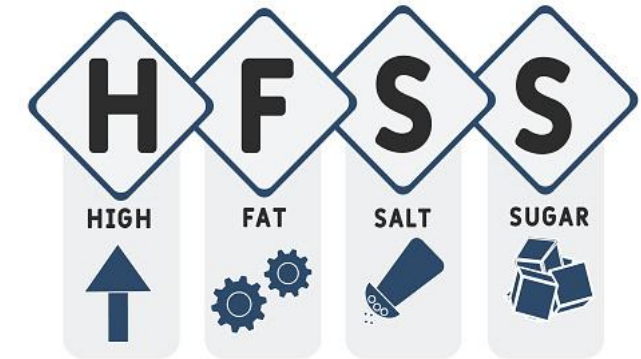


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1

What were the impacts of the HFSS product placement legislation on sales on in-scope HFSS products?



2

Were the impacts of the HFSS legislation equitable across deciles of the Priority Places for Food Index (PPFI)<sup>1</sup>?

<sup>1</sup>Priority Places for Food Index is a composite index identifying neighbourhoods most vulnerable to the cost-of living increases and with less access to affordable, healthy and sustainable food. <https://priorityplaces.hasp.ac.uk/>



# Research design & data sources



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Daily food and drink sales data was obtained for up-to-18 months pre-legislation and 12 months post-legislation from 4 major UK retailers, who collectively represent 65% of UK supermarket sales.



Data were obtained for 640 stores across England (n=160 per retailer), and 200 stores across Scotland and Wales (n=50 stores per retailer)<sup>1</sup>



Equal number of stores selected across each decile of the Priority Places for Food Index<sup>2</sup> (16 stores per decile).



Product nutrition data for branded and own-brand food and beverage products were obtained from retailers and NIQ Brandbank to assign a HFSS status to sold products.

The ASDA logo, featuring the word "ASDA" in a bold, green, sans-serif font.

The Morrisons logo, featuring a stylized yellow flower icon above the word "Morrisons" in a green, sans-serif font.

The Sainsbury's logo, featuring the word "Sainsbury's" in an orange, sans-serif font.

The TESCO logo, featuring the word "TESCO" in a bold, red, sans-serif font with blue diagonal stripes below it.

<sup>1</sup>Stores selected from the total pool of stores that sell foods and beverages and meet legislation store size requirements, identified from the 2023 Geolytix Retail Points dataset.

<sup>2</sup>Priority Places for Food Index <https://priorityplaces.hasp.ac.uk/>



# Real world data at scale



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## 3 retailers

Three of the major UK supermarket retailers



## 11.6 billion items

sold over the study period across the three retailers



## 2.5 years

of daily store-level data



## 480 stores

in England within our sample



## 37 thousand

Average number of unique products per retailer



## 6.8 billion kg

sold over the study period across the three retailers

## Planned approach



## Real-world research



Findings from mixed-methods revealed that store level changes were introduced across borders, in stores in Scotland and Wales despite the legislation not mandated outside England.



Manufacturers reformulated branded and own-brand products in response to legislation to achieve compliance. Product reformulations happened across all UK nations.



Interrupted time series analysis was used to estimate the effect of the legislation on in-scope HFSS sales by weight and unit volume



Separate interrupted time series analysis models were run for each retailer for stores in England.



Effect estimates were pooled across retailers in a random-effects meta-analysis model to provide an overall pooled estimate of the impact of the legislation.

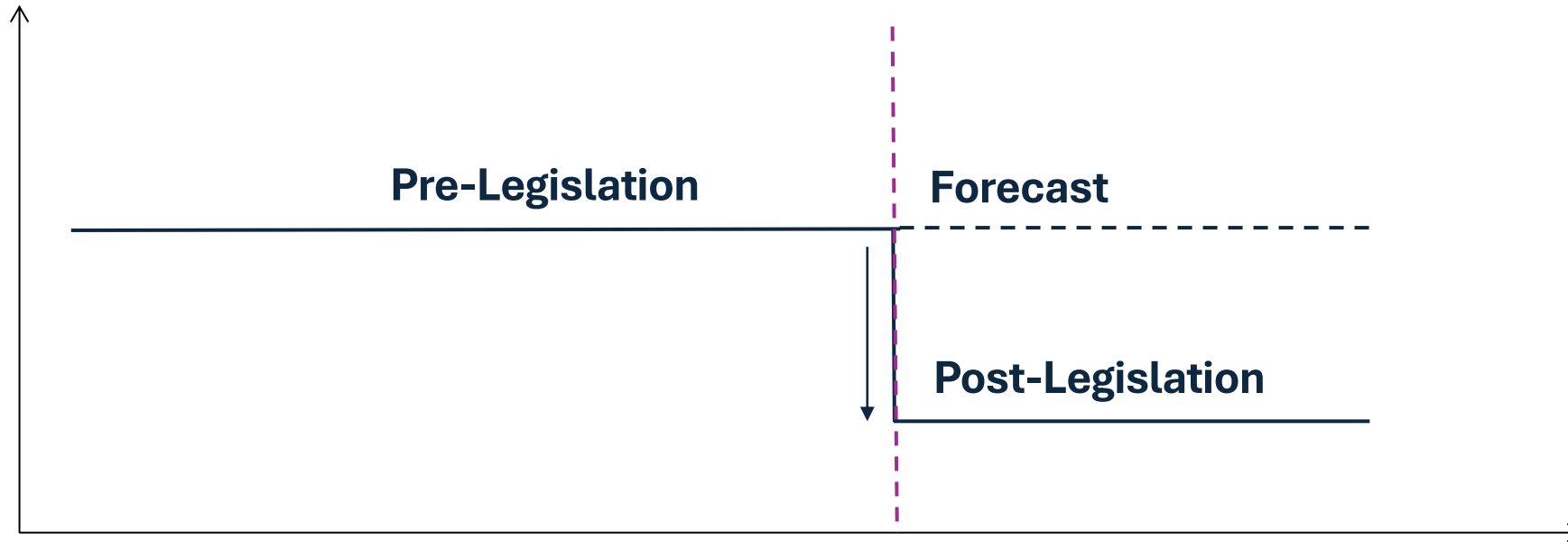




# Interrupted Time Series Analysis: Results



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**By weight**  
decreased **0.63**  
percentage points  
Baseline 9.4%

**By units sold**  
decreased **1.19**  
percentage points  
Baseline 19.5%

**These percentage point reductions correspond to a 6.7% and 6.1% relative decrease from original levels**

The estimated reduction of in-scope HFSS purchases attributable to the legislation across all stores in England is

**220,000**  
tonnes over a year <sup>1</sup>

This equates to

**2 million**  
fewer items sold per day



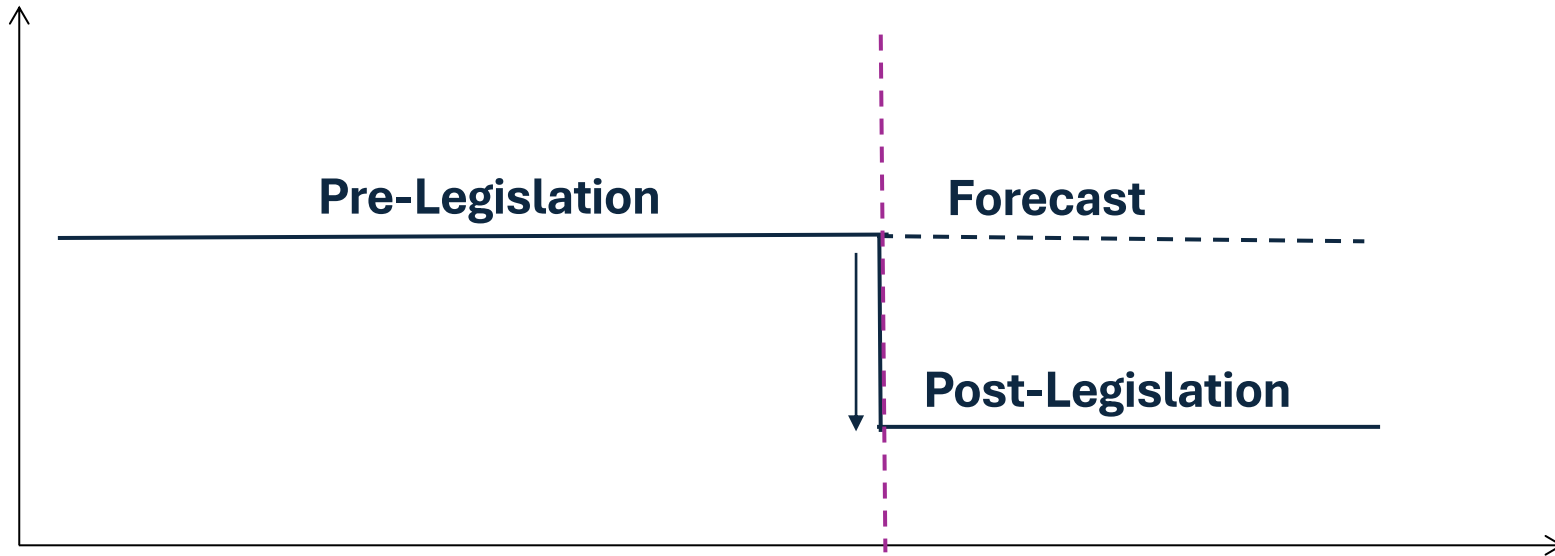
<sup>1</sup>These estimates were calculated by taking average sales (by weight and by unit volume) across the 12-months leading up to the legislation; applying the meta-analysis result to calculate the average reduction in HFSS product sales (by weight and by unit volume) per store attributable to the legislation across this period and then extrapolating to all stores in England that would be eligible for HFSS legislation. Since we do not have data on exact numbers of stores eligible for legislation, we applied the calculation to the 6023 grocery stores in England sized over 280m<sup>2</sup>, identified from Geolytix (2023 - <https://geolytix.com/blog/supermarket-retailpoints/>). The change does not include any longer-term changes in HFSS/non-HFSS purchases over the period e.g. as a result of inflation; instead we estimate the impact of the legislation after accounting for (i.e. excluding the impact of) these longer-term trends.



# Results by retailer

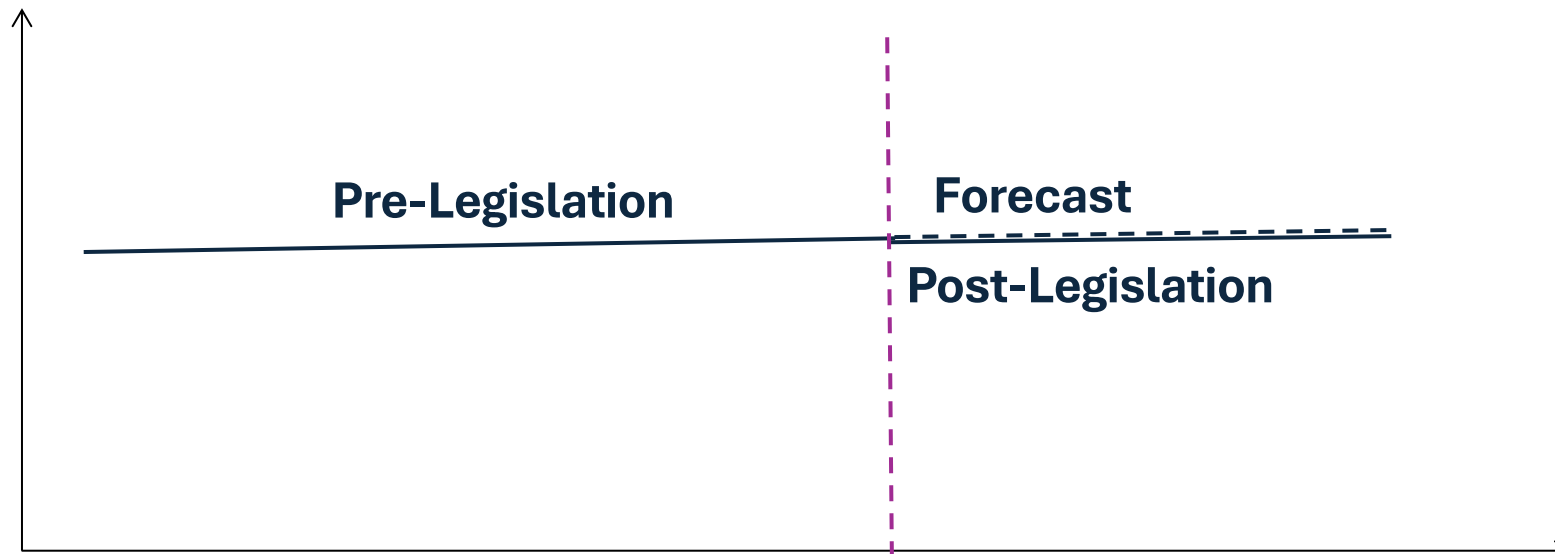


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**Reduction in  
sales observed in  
2 retailers**

(by weight = 0.88 & 0.87  
percentage point reduction)



**No difference  
1 retailer**

Where there was an impact seen in the retailers it was **equal** across different areas





# Key takeaways



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First study to use supermarket sales data from 3 UK retailers **to independently evaluate** the **effectiveness** and **equitability** of the legislation.

**The legislation reduced sales of in-scope HFSS products** as a proportion of total sales by weight and by unit volume.

**Impacts of the legislation on sales of HFSS products were equitable**

The findings are **promising and demonstrate** that **restricting placement-based promotion of less healthy foods** can lead to **meaningful change** in sales.

## Thank you to our co-authors and contributors to this work

Michelle Morris, Alexandra Johnstone, Alice Kininmonth, Alison Fildes, Vicki Jenneson, Emma Wilkins, Robyn Naisbitt, Rebecca Stone, Francesca Pontin, Jason Halford, Emily Ennis, Ifeanyi Chukwu, Obose Eselebor, Katie Van, Georgia Tomova

Protocol



Pre-print



Contact

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### Funding:

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March 2026

**IGD** Health

**From research to action:  
cross-collaboration learnings for  
transforming UK food systems**

Hannah Skeggs – Senior Health  
and Sustainable Diets Manager



We are a strategic food and grocery insight, foresight, and learning organisation. Here to unite the industry and benefit society. We invest all our profits into social impact.

*We are your IGD.*

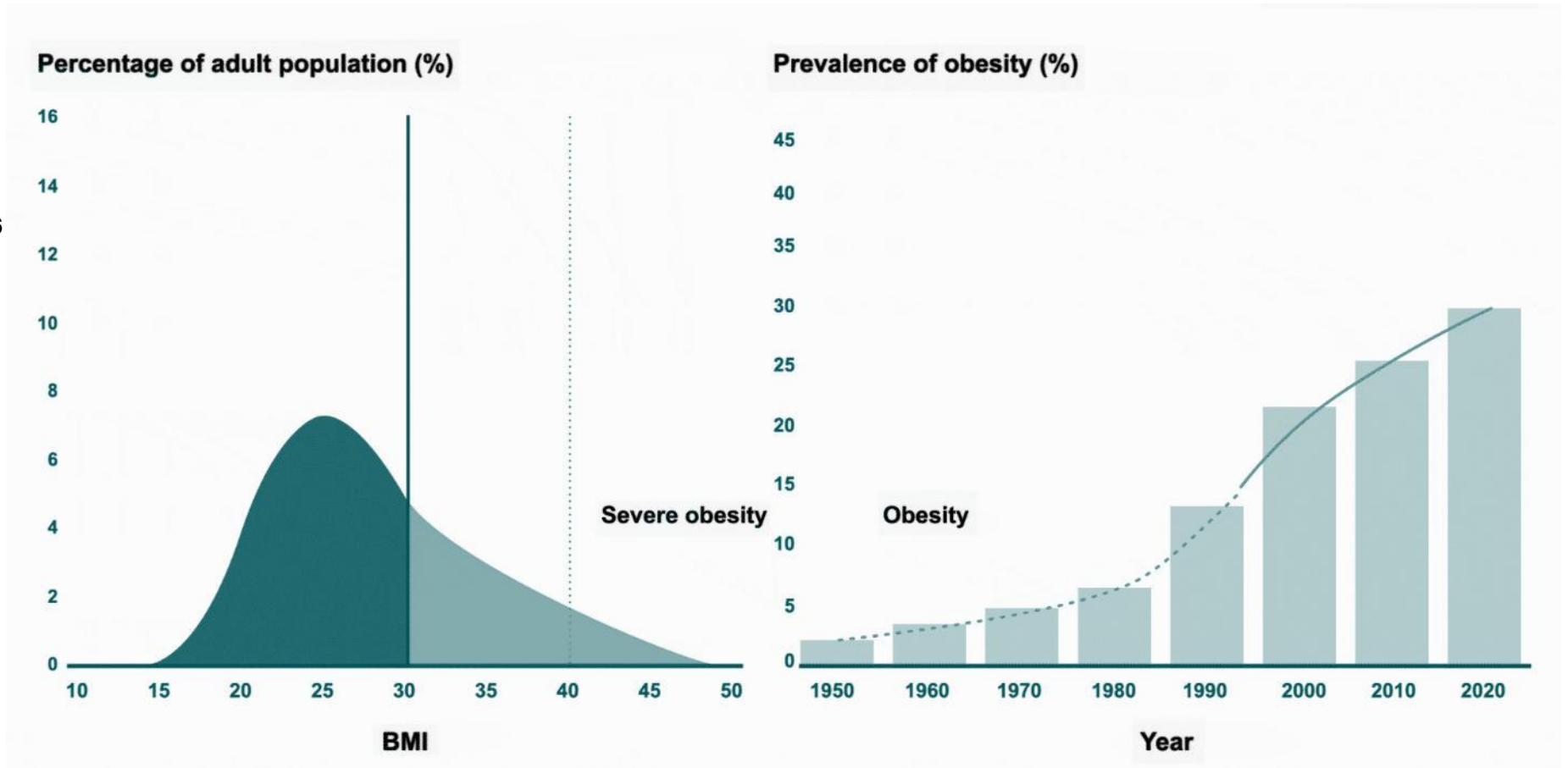
# Obesity levels are at an all-time high

## 1 in 5 children leave primary school with obesity

Obesity poses a major challenge for individuals, businesses, and the wider economy. The total cost to the UK of obesity and overweight is £126 billion.<sup>1</sup>

Nearly 1 in 5 children leave primary school with obesity<sup>2</sup>, without change this trend is projected to worsen.

Recognising the urgency, the government's 10 Year Health Plan sets the ambition to 'raise the healthiest generation of children ever'.



# Recent data shows the population needs to eat more fruit and vegetables, and less sugar and saturated fat

Less than

# 1%

of UK adults achieve all the recommendations set out in the Eatwell Guide<sup>1</sup>

# 96%

of UK adults don't consume enough fibre<sup>2</sup>

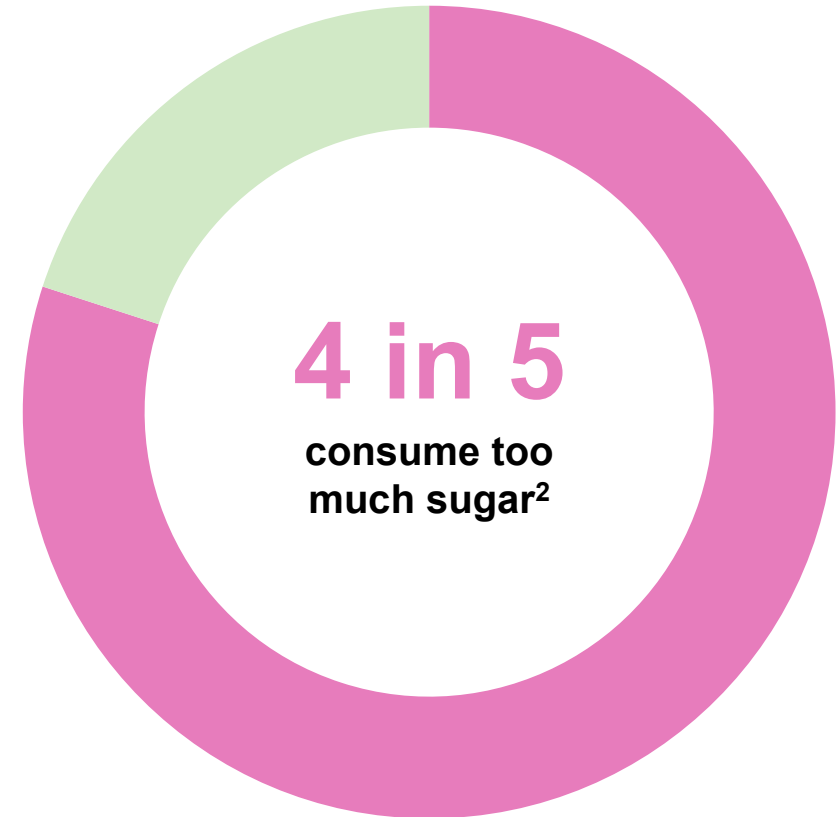
# 82%

of the population are consuming too much saturated fat<sup>2</sup>

Only

# 17%

of the population eat enough fruit and vegetables<sup>2</sup>



# Changing behaviour at scale is not easy

*Education alone is not sufficient to shift behaviour*

*(Hagger et al., 2020)*

*Efforts should instead focus on changing behaviour through less conscious processes activated through environments*

*(Marteau et al., 2012)*



Cross-sector collaboration isn't a  
buzzword

**It's a discipline**

# Taking action together

Since 2021, IGD and the University of Leeds have collaborated with six major retailers to understand what works to support consumers towards healthier and more sustainable choices.

- Together we are experts at working across the food industry and academia to deliver great research.

In 2023 we won the ESRC Celebrating Impact award for outstanding business and enterprise impact.

- We are individually and collectively trusted.



This research is part of the wider academic collaboration Diet and Health Inequalities Project, led by Professor Alex Johnstone at University of Aberdeen











In this research, four retailers signed up to share large scale data and to support the analysis, as well as participating in retailer interviews and surveys, alongside BRC and trading standards.



# Using supermarket transaction data

Testing theory in real world settings

- 01 Promoting Fruit and Vegetables 
- 02 Boosting Value of Healthy Start 
- 03 Ranging Plant-Based with Meat 
- 04 Signposting Healthier Swaps 

- 05 Dual-Ranging Salads 
- 06 Signposting Healthier Snacking In Meal Deals 
- 07 HFSS – Independent Evaluation 
- 08 **NEXT:** Health vs Sustainability vs Taste

# BUILDING

## COMPROMISE

EVERYONE'S IN THEIR OWN LANES

WHAT CAN YOU WORK ON TOGETHER?



BENEFITS CAN BE INDEPENDENT

PERSONAL RELATIONSHIPS TAKE TIME TO DEVELOP



WORKING IN THE SAME SPACE

SHARED VALUES

LEARN HOW TO MANAGE PARTNERSHIPS

FEED IMPACT AND INSIGHT BACK INTO INDUSTRY

"SHARE YOUR WORKING"

### HOW DO WE BUILD AND MAINTAIN EFFECTIVE PARTNERSHIP WORKING IN FOOD SYSTEMS RESEARCH

HOW CAN EARLY CAREER RESEARCHERS START TO BUILD PARTNERSHIPS?

NAVIGATE LANGUAGE BARRIERS

HESITANCY TO WORK WITH INDUSTRY

GUIDANCE ON HOW TO NAVIGATE THIS

# MAINTAINING

- ADDRESS KNOWLEDGE GAPS
- GUEST LECTURSHIPS
- IMPACT ACCELERATION ACCOUNT

REGULAR CHECK-INS WITH CONTACTS

INVESTMENT IN RESEARCH ENABLERS AND DIVERSE EXPERTISE

QUANTIFY WHO GETS WHAT?



PARTNERSHIP SUSTAINABILITY

MANAGE STAKEHOLDER FATIGUE

COMMUNITY RESEARCHERS WITH SHORT-TERM FUNDING

INDUSTRY HESITANCY TO SHARE DATA

SHARE WHAT WORKED

HOW LEARN FROM OTHERS

18/07/2023



Bringing this to life on DIO-Food

# Conclusions for Policy Makers



## Policy frameworks

### Clarification on legislation, will enable stronger implementation

The research findings, indicate the policy's mechanisms were unclear.

Using evidence to clarify legislation and its mechanisms, will improve outcomes & minimise unintended consequences.



## Focus on data

### Standardising data definitions and systems will allow for robust, consistent evaluation, supporting transparency and accountability.

A shared definition for healthier sales will lay the groundwork for policies like mandatory reporting by enabling consistent tracking across the food industry.



## Evaluate consistently

### ONS data shows most policies are not robustly analysed.

Implementing a consistent, long-term evaluation framework is vital. This includes funding independent pre and post-implementation research and tracking key metrics.

These metrics should go beyond sales data and look at outcomes such as population obesity levels too.



## Iterate guidance

### Clearer guidance for businesses could eliminate uncertainty and ensure a level playing field.

Providing further detail and resources on FAQs with sufficient lead time to implement, would facilitate better planning, reduce compliance costs, and improve implementation.



## Foster collaboration

### To accelerate progress academia, the food industry, and NGOs must actively collaborate and share insights.

By implementing clear communication strategies, convening cross-sector forums, and ensuring diverse voices and evidence are heard policymakers can drive coordinated, impactful action.



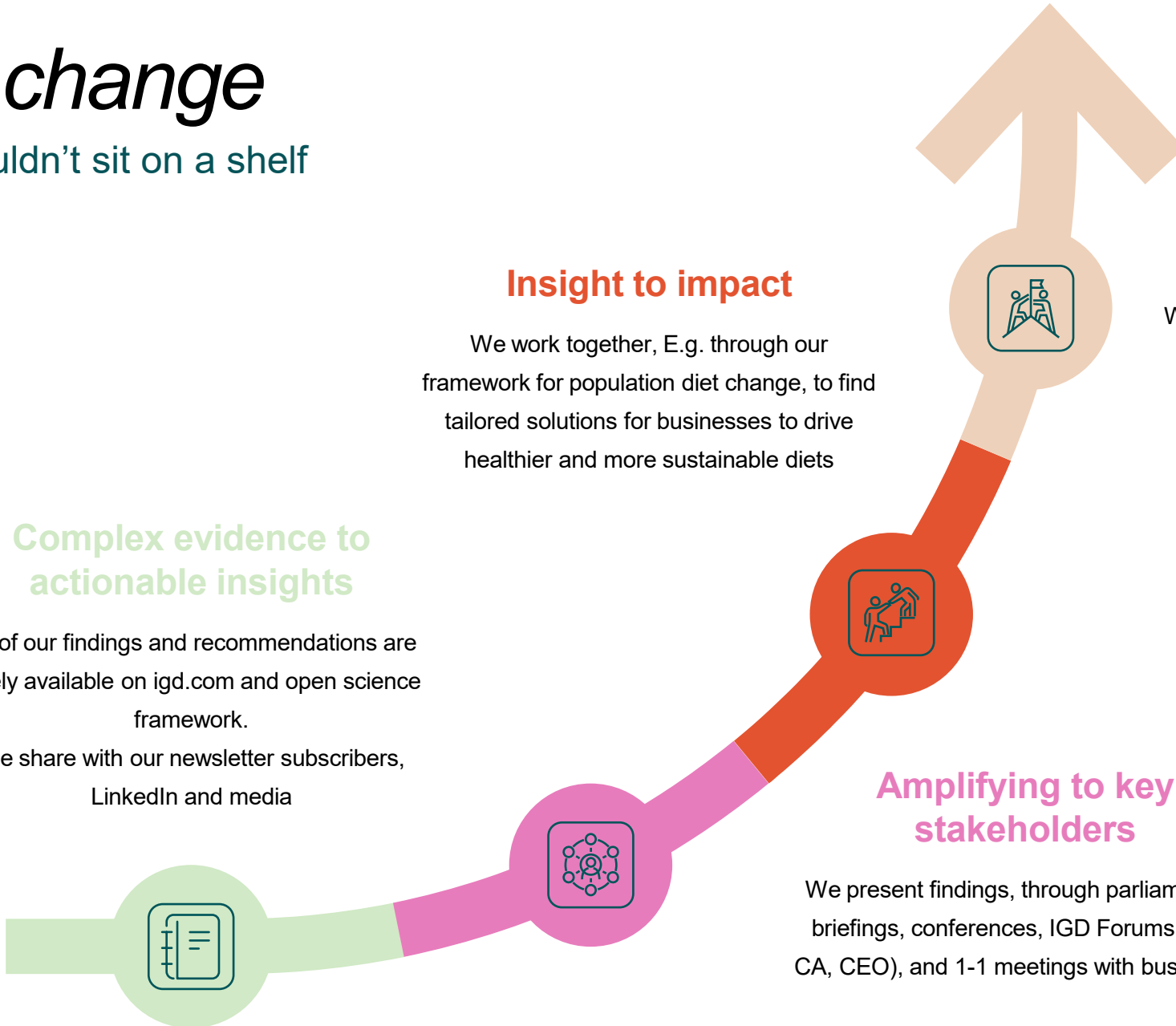
*We stand at the cusp of a historic reversal. Today, we have the science, technology and public health knowledge to end the obesity epidemic.*

Fit for the future,  
NHS 10 Year Plan 2025



# Driving change

Research shouldn't sit on a shelf



## Complex evidence to actionable insights

All of our findings and recommendations are freely available on [igd.com](http://igd.com) and open science framework.

We share with our newsletter subscribers, LinkedIn and media

## Insight to impact

We work together, E.g. through our framework for population diet change, to find tailored solutions for businesses to drive healthier and more sustainable diets

## Amplifying to key stakeholders

We present findings, through parliamentary briefings, conferences, IGD Forums (NLF, CA, CEO), and 1-1 meetings with businesses

## Systems thinking and future focus

We are engaging food system stakeholders to collaborate for public health benefit. E.g. Our recent collaborative roundtable on Free Sugars, and our CEO Co-chairs the Food Strategy Advisory Board

# Iterate and strengthen

Uniting and inspiring everyone to deliver a thriving food system.



We convened a roundtable to tackle challenges implementing the new nutrient profiling model.

Collectively, participants represented a broad cross-section of product categories and supply chains, including sectors where free sugars are expected to be particularly complex.

Technical and nutrition experts represented:

- Retail
- Food manufacturing
- Trade associations
- Ingredient suppliers
- Academic institutions
- Technical consultancies
- NGOs

We continue to work to shift towards dietary guidance



# Three pillars of successful collaboration

## Trust

Building the "safe space" for retailers to share sensitive data and insights.

**Evidence is strongest when sectors work together**

## Translation

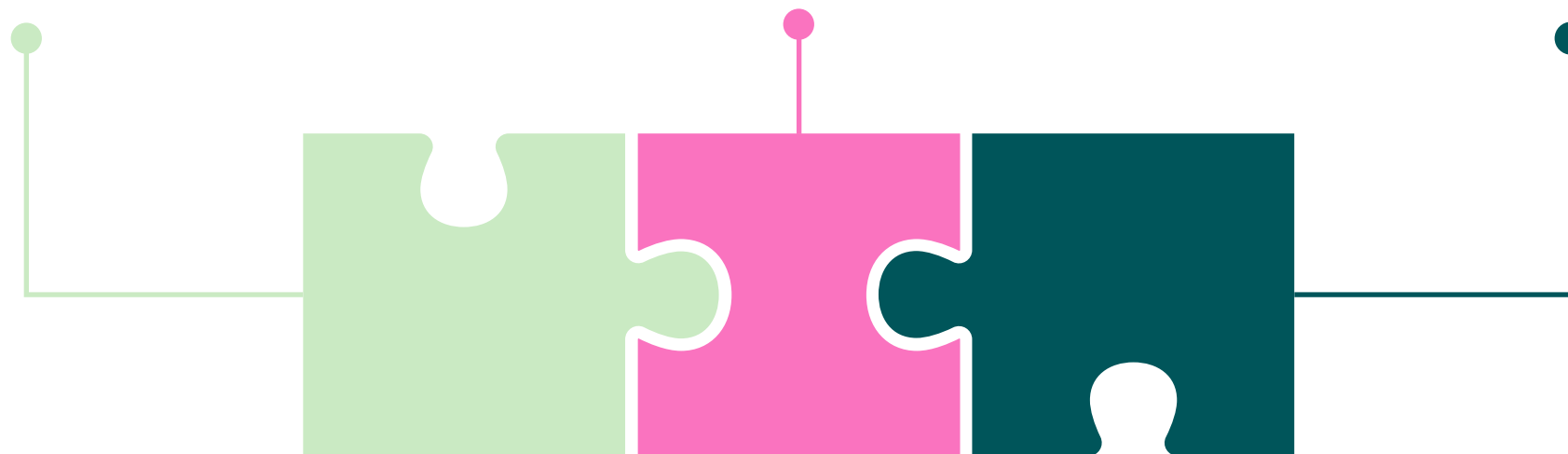
Ensuring we speak the same language and tailor insights to drive action.

**Impact requires communicating findings in ways that decision makers can use**

## Agility

Make a big impact with professional slides, charts, infographics and more.

**Data access can unlock transformational insights at pace**



**No single organisation can solve food system challenges alone**

## If we want to transform food systems, we must continue to transform how we work together

Interventions can be collaboratively designed, run and analysed – but they need to be viable for industry, and/or mandated

Receiving, cleaning and analysing data is a huge task, and every answer brings more questions

There is no silver bullet for health

The future lies in

- cross-sector collaboration
- data-enabled research
- translating evidence into action, across a level playing field



**IGD**

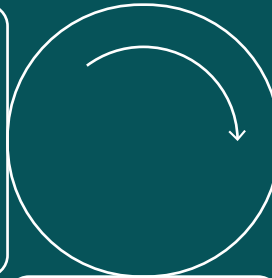
# Thank You



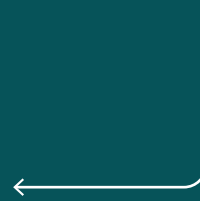
**Grow**



**Make**



**Move**



**Shop**



**Eat**

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# The panel



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