

How well have UK supermarkets supported families to access and afford healthy staples through the cost of living crisis?

THE KID'S FOOD GUARANTEE: ONE YEAR ON

MAY 2024



The Food
Foundation

Executive summary

- Food prices are still **25% higher** than they were two years ago, with food insecurity affecting **15%** of UK households.
- The cost of living crisis is impacting on dietary quality, especially for **lower income families**. Just under half of households experiencing food insecurity reported buying less fruit and vegetables, dairy and oily fish in January 2024.
- As a response to the crisis, The Food Foundation launched the [Kids Food Guarantee](#) in March 2023. The Kids Food Guarantee is a **set of actions** which we think retailers (and manufacturers) should have in place as a minimum to support low income families to access and afford healthy staples.
- The Food Foundation's tracking of retailer performance over the past year shows that while progress is being made, this is not happening at the pace or scale it needs to be. **Progress and performance are inconsistent**, varying both by retailer and by guarantee area.
- Overall, Tesco perform most strongly in supporting low income families to access and afford healthy staples, while Morrison's hold a laggard position.
- In this briefing we summarise our findings, looking at retailer progress and performance against the following areas: **multibuys** and **price promotion deals**, **fruit and vegetables**, **staple carbohydrates**, **first infant formula**, **children's lunchboxes**, **yogurt and cereals**, and the **Healthy Start scheme**.

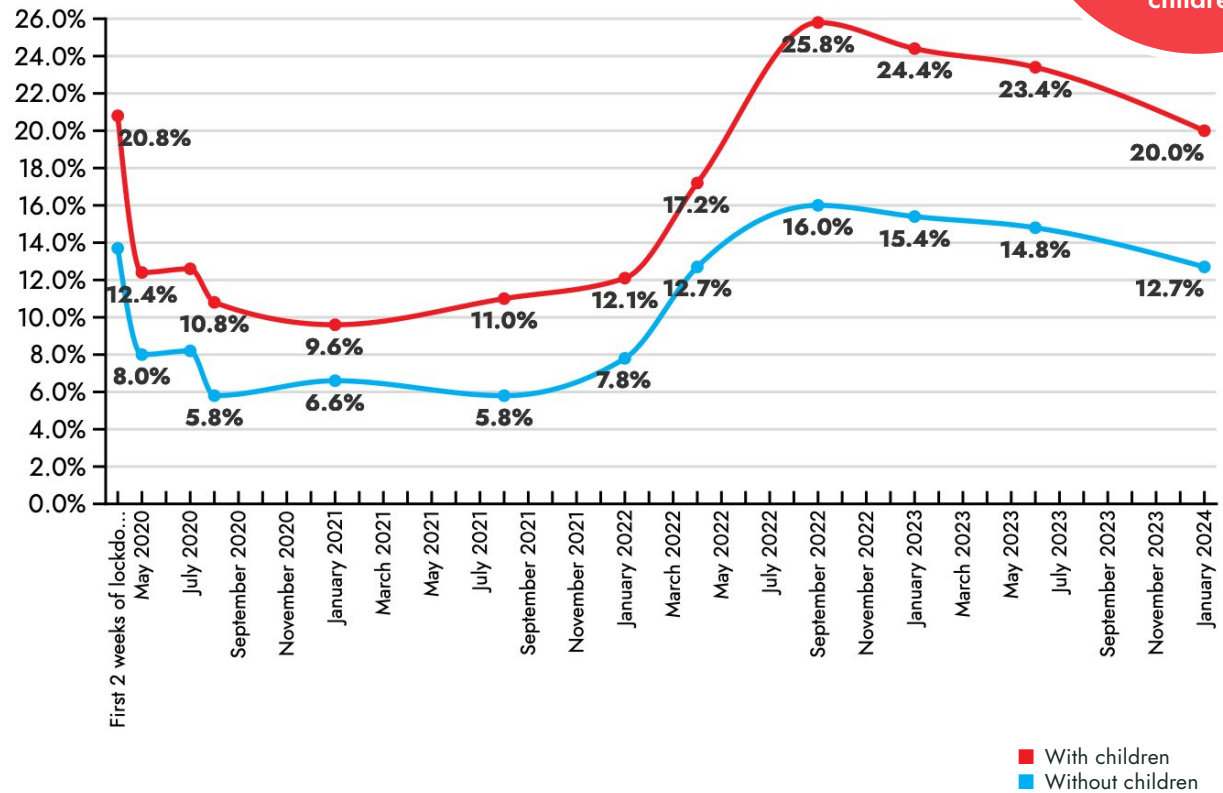
Introduction

The cost of living crisis has placed food insecurity in the spotlight

In April 2023, food inflation reached its highest level for four decades ([Office for National Statistics, 2023](#)). Although general inflation has since slowed (to 3.2%), food inflation remains higher (4%). As of April 2024, the Food Foundation's Basic Basket tracker shows that the cost of an adequately nutritious diet for adults has increased by approximately 25.3% compared to its cost in April 2022. This is likely to be impacting on UK citizens' diets with health consequences for low-income families who bear the brunt of food price rises:

- In January 2024, **8 million adults** (15% of households) lived in households experiencing food insecurity, with levels among children doubling in the 12 months to January 2023 ([The Food Foundation tracker](#)).
- **A fifth** of households with children (20%) reported experiencing food insecurity compared with 12.7% of households without children.
- This figure is even higher for those with pre-school children aged under 4, where **24%** of households reported experiencing food insecurity.

Percentage of households experiencing food insecurity*



20.0% of households with children reported experiencing food insecurity compared with 12.7% of households without children

* 1-month recall period

In addition to those families struggling to access and afford adequate amounts of food, budgetary pressures are also likely to be impacting on the healthiness and quality of diets.

- Defra's Family Food Survey captures UK households' purchases of food from both retail and the out of home (OOH) sectors. Concerningly, purchases of vegetables dropped to their lowest level in fifty years for the last year we have data (2021-2022).
- Lower income households are most affected; a Food Foundation survey of 6,000 adults in January 2024 found that over half of households with food insecurity reported buying less fruit, dairy and oily fish, with 44% reporting buying fewer vegetables – all essential for supporting a healthy diet and normal growth and development in children (The Food Foundation, 2024).

With UK food price inflation among the highest of G7 economies in March 2023 against a backdrop of high levels of food insecurity, there have been increasing reports of 'greedflation', or 'profiteering' in the UK. In July 2023 the Competition and Markets Authority (CMA) issued a report effectively clearing the supermarkets of any profiteering accusations (CMA, 2023). However, a subsequent CMA report in November 2023 looking at specific product categories, found that prices of infant formula were higher than they should be due to a lack of competition in the market, with prices having been raised above input costs.

Food companies have therefore been under pressure to demonstrate that they are working to support the health of their customers rather than simply maintaining profit margins. Certainly, with consumers increasingly price conscious and with price trumping brand loyalty (Davey, 2021), there is a commercial incentive as well as a moral imperative for businesses to act.

IN RESPONSE TO THIS WIDER CONTEXT, THE FOOD FOUNDATION LAUNCHED THE KIDS FOOD GUARANTEE IN APRIL 2023

The Kids Food Guarantee is a set of actions which we think **retailers (and manufacturers) should have in place as a minimum to support families facing food insecurity. Better pricing for health is critical for ensuring that low-income groups are able to access a healthy diet** during the cost of living crisis. It also allows retailers to support a shift towards healthier and more sustainable baskets in the longer-term, in line with existing corporate responsibility commitments and targets. As the main funnel through which food is sold and purchased within the UK, supermarkets ought to ensure that they are doing all they can to:

1. Help families who are on very low incomes to secure an adequate diet
2. Support families who are not in the poorest category, but are shifting their purchasing because of cost pressures, to switch to healthier and more sustainable options with benefits that outlast the current crisis.

Regular tracking of retail performance against these different areas has been reported via the Kids Food Guarantee dashboard. Using data provided by our partners [Questionmark](#), an international non-profit think tank, we have been continually monitoring retailer progress against the Kids Food Guarantee areas since April 2023.

Further details on our methodology can be found in our [technical report](#).

Our Kids Food Guarantee Dashboard with data and reports can be found [here](#).





The Food Foundation Kids Food Guarantee

Actions to guarantee that children can eat well during the cost-of-living crisis and prevent lasting damage to their health and wellbeing

Make essentials affordable

1 Fruit and Veg Guarantee

Ensure that at least a week's worth of 5 a day (>10 different products, fresh, frozen or tinned) are competitively priced and available at all stores.



2 Staples Guarantee

- Guarantee multibuy deals on carbohydrate staples not on HFSS foods
- Guarantee wholegrain and/or 50:50 wheat products are at price parity or at a lower price to the refined equivalent
- Guarantee budget ranges are available in every store, including local and convenience
- Offer an own-brand formula and/or insulate prices on first infant formulas from the worst of inflation.



Support health for those feeling the squeeze

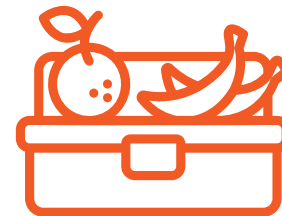
3 Kids Categories Guarantee

Guarantee that products in two key kid's categories responsible for the majority of sugar intake (**yogurts** and boxed **breakfast cereals**) are both healthy and affordable. The cheapest options ought to have the best health profile.



4 Lunch box Guarantee

Lunchbox meal deal. Offer weekly lunchbox items that are compliant with School Food standards and make up 5 lunches that can be bought through a multibuy deal.



Rebalance shopping baskets

5 Act for a healthier, more sustainable future

- Advocate for the expansion of the Healthy Start scheme
- Promote and communicate the Healthy Start scheme
- Rebalance advertising so that a greater % of promotions, marketing and campaigns are focused on healthier and more sustainable staple foods such as fruit and veg, pulses and wholegrains



Overview of retailer performance within each guarantee area

Guarantee area	Aldi	Asda	Co-op	Iceland	Morrisons	Ocado	Sainsbury's	Tesco	Waitrose
Fruit and veg guarantee									
Availability of fruit and veg	↑	↑	↓	↓	↓		↑	↑	
Added sugar/salt in fruit and veg	↑		↓		↑		↓	↑	
Staples guarantee									
Multibuy					↓			↑	
Price Promotions*	↑						↓	↓	
Wholegrains	↓	↑	↑	↓	↓		↑		
First infant formula	↑	↓	↓	↑		↓			↓
Kids categories guarantee									
Yoghurt	↓	↑					↑	↑	
Cereal							↑		
Lunchbox guarantee					↓		↓	↑	
A healthier, more sustainable future									
Healthy Start	↓	↓	↑	↑			↑		

↑ Leader ↓ laggard □ Not currently monitored for this guarantee area

For those guarantee areas where performance was not monitored for all nine of the largest UK supermarkets, retailers omitted from the review process have been shaded grey. The red and green highlighting of retailer names (Tesco and Morrisons) denotes the retailers who overall, across all guarantee areas monitored so far, hold the highest number of leader or laggard positions. Although Sainsbury's perform strongly across a number of Guarantee areas they are not marked as overall leaders given their higher number of laggard positions.

*Full details of retailer performance on price promotions can be found in our January 2024 report [here](#)

Making essentials affordable

GUARANTEE AREA

1 FRUIT AND VEG



Ensure that at least a week's worth of 5 a day (>10 different products, fresh, frozen or tinned) are competitively priced and available at all stores.

WHY IT MATTERS

There is universal consensus that fruit and veg are the cornerstone of healthier (and more planet friendly) diets. In the UK it's recommended that everyone eats at least five portions of fruit and veg a day (400g). Low levels of fruit and veg consumption have a direct impact on disease outcomes. Yet consumption of fruit and veg is where the widest dietary inequalities are seen between high and low income households.

↑ LEADERS

We looked at the 70 lowest priced fruit and veg on a price per portion basis for each of the seven major UK retailers¹. Fresh, frozen and tinned items were all included, given that frozen and tinned fruit and veg can be more affordable than fresh and offer comparable nutritional benefits. We looked first at the nutritional profile of all 70 products (specifically at whether products had added salt and/or sugar) and then compiled a final basket of ten low-cost fruit and veg portions for each retailer.

1. **Sainsbury's, Tesco, Aldi and Asda** offer families the best choice in terms of competitively priced fruit and veg for a week's worth of 5-A-Day.
2. **Morrison's, Aldi and Tesco** had the lowest proportion of low cost fruit and veg with added sugar and/or salt

↓ LAGGARDS

1. **Co-op, Iceland and Morrisons** are comparatively more expensive for buying a week's worth of fruit and veg.
2. **Sainsbury's and Co-op** had the highest proportion of low cost fruit and veg with added sugar and/or salt, with almost a fifth of their lowest priced fruit and veg products containing salt and/or sugar (18.5%).

ACROSS THE SECTOR

While all the retailers offer competitively priced fruit and veg, low income customers in particular may still struggle to afford enough fruit and veg, especially when feeding families. Even if poorer families were buying the lowest priced fruit and veg available, to afford a week's worth of 5-a-day would cost between 34-52% of one person's weekly food budget. This compares to 17-26% for the wealthiest 10% of families.

Additionally, the very lowest priced products can contain added salt and/or sugar - **1 in 7 (14%) of the lowest priced fruit and veg products across the seven major retailers contains added salt and/or sugar**. Budget fruit and veg also do not appear to be that readily available in physical stores. Of the 30 stores we visited, just one (a superstore) had all ten of the lowest priced fruit and veg we identified available.



¹ Aldi, Asda, Co-op, Iceland, Morrisons, Sainsbury's, Tesco.



RECOMMENDATIONS FOR INDUSTRY:

- Ensure that a range of budget fruit and veg products are available across all stores, including convenience and express store formats.
- Work to ensure there is a shift away from products with added sugar and/or salt in tinned fruit and veg products.
- Review the often very stringent specifications for fruit and veg sometimes specified by retailers in their contracts with growers, so that more imperfect produce can be sold to citizens. This would need to be at prices which reflect the cost of production – currently farmers are expected to sell 'wonky veg' for less.



RECOMMENDATIONS FOR POLICY MAKERS:

- Require the cost of healthy and sustainable diets to be taken into account when setting benefit levels and the National Living Wage.
- Commit to an ambitious horticulture growth plan for British farmers in each of the devolved nations for an expanded, vibrant, and thriving horticulture sector which can support the production and increased consumption of fruit, vegetables and legumes, and ensure the UK is not unsustainably reliant on imports.



 Read our fruit and vegetable report in full [here](#)

GUARANTEE AREA

② STAPLES



MULTIBUY DEALS

Guarantee multibuy deals are on healthy staples not on HFSS foods

WHY IT MATTERS

While promotions make products cheaper, they also tend to encourage people to buy more of the promoted category than expected. On average, volume promotions (multibuy or Buy One Get One Free offers) increase the amount purchased by 22% (Public Health England, 2015).

↑ LEADERS

Tesco. Just 6% of Tesco's multibuy deals are on HFSS food and drink, as defined by the government's Nutrient Profile Model (NPM). Following the government's decision to postpone the planned ban on HFSS multibuy deals to 2025, Tesco showed leadership by making a commitment to stop running multibuy deals on HFSS food.

↓ LAGGARDS

Morrisons. 11% of multibuy deals go towards food and drink defined as HFSS at Morrisons. The proportion of multibuy deals on non-HFSS (healthier) food and drink at Morrison's decreased by 3.2% between April and August 2023.

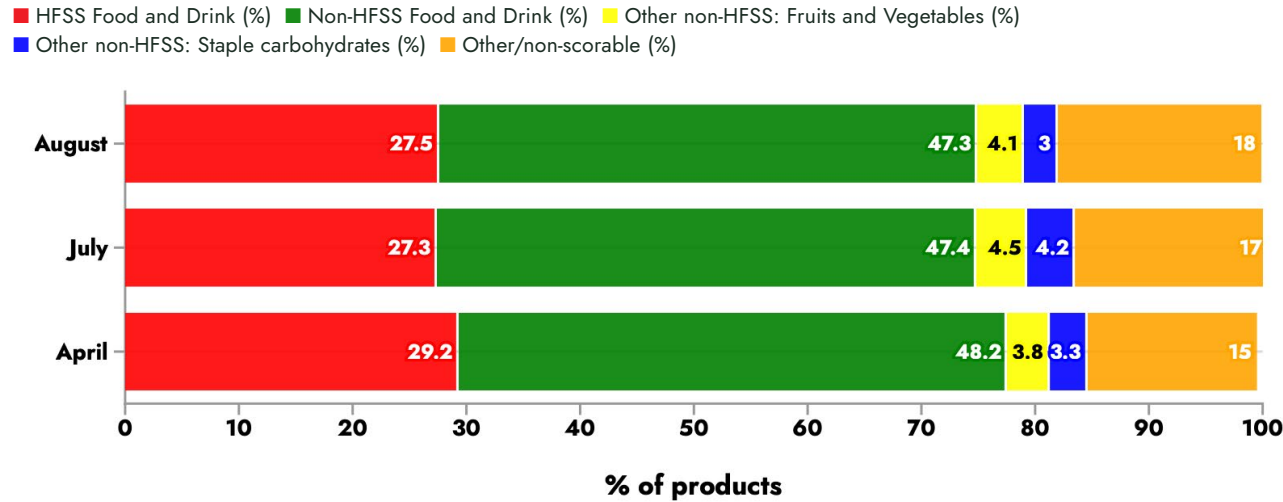
ACROSS THE SECTOR

Over a quarter (27%) of multibuy deals are on HFSS food and drink, while just 4% of multibuy deals are on fruit and vegetables and 3% on staple carbohydrates.

Additionally, data from August 2023 showed that 41% of price promotions are on food and drinks high in salt, sugar and fat, with this type of promotion more prevalent across the major retailers compared to volume promotions.



The proportion of multibuy offers on different types of food and drink (April -August 2023)



HFSS: High in Fat, Salt and Sugar (NPM score =>4 Food and n=>1 Drink); Non-HFSS: NPM score <4 Food and n<1 Drink. Data collected from the retailers in scope: ASDA, Morrison's and Tesco.



RECOMMENDATIONS FOR INDUSTRY:

- Where retailers do offer multibuy offers, they should ensure that healthier staples like wholegrain carbohydrates and fruit and vegetables are offered at competitive prices (provided that any cost savings aren't simply pushed back onto growers and producers) throughout the year, with budget ranges available across all stores.



RECOMMENDATIONS FOR POLICY MAKERS:

- Bring forward the delayed legislation for volume promotion restrictions on foods which are high in fat, sugar and salt (HFSS). HFSS volume promotion restrictions already have the necessary legislation in place to be swiftly implemented and yet they have been delayed until 2025.
- Ensure that enough resource is allocated for local authorities to be able to support successful implementation and enforcement of HFSS restrictions.
- UK governments ought to also review other types of promotions which are common on HFSS foods, such as price promotions (as the [Scottish government](#) have recently done) and implement policies which incentivise businesses to shift these promotions to non-HFSS foods.



Read our [July 2023](#), [October 2023](#) and [January 2024](#) reports on multibuy and price promotions

GUARANTEE AREA ② STAPLES



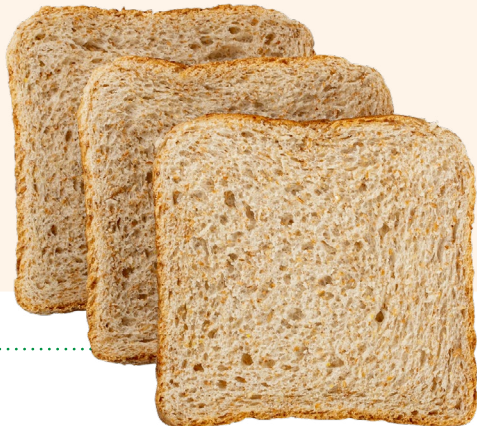
WHOLEGRAINS

Guarantee wholegrain and/or 50:50 wheat products are at price parity or at a lower price to the refined equivalent

WHY IT MATTERS

The Government's guidelines for a healthy diet (the Eatwell Guide) recommend that meals are based around starchy carbohydrate foods, such as bread, rice, or pasta, which should make up just over a third of the food we eat. It specifically recommends that citizens choose higher fibre or wholegrain varieties of these foods.

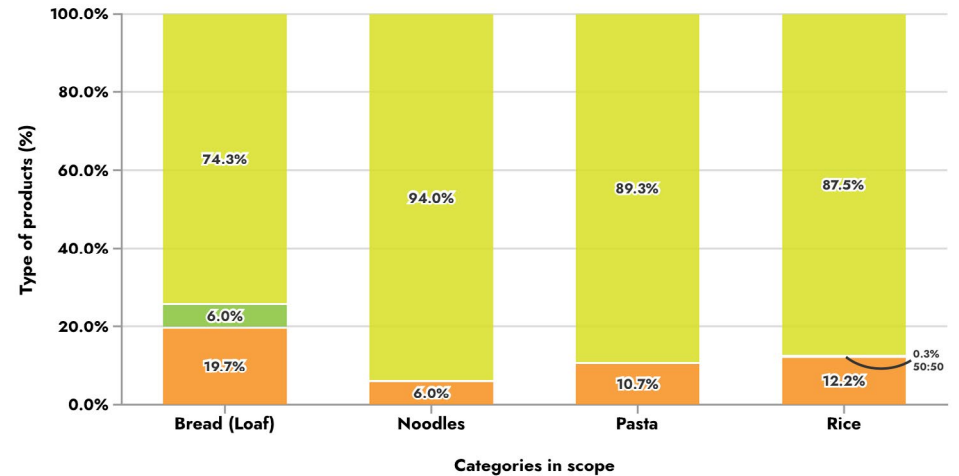
Wholegrains can contain up to 75% more nutrients than refined cereals, are high in fibre, and have a number of health benefits. The National Food Strategy for England recommended that intakes of fibre ought to increase by 30% by 2030 in order to meet both health and environmental goals.



Type of available products under four selected categories across retailers in scope

■ Wholegrain
■ 50:50
■ White

Data was collected between the 21st – 25th November 2023. The 0.3% of 50:50 products within the Rice category refer to mixes of wholegrain and white rice (not shown inside the graph).



Price comparison of white products and wholegrain equivalents across retailers in scope

Category	Bread (loaf)	Noodles	Pasta	Rice
Aldi	X	∅	⌊ ⌋	X
Asda	⌊ ⌋	X	X	X
Co-op	X	X	⌊ ⌋	X
Iceland	⌊ ⌋	∅	∅	X
Morrisons	X	∅	X	X
Sainsbury's	⌊ ⌋	X	X	X
Tesco	X	∅	X	⌊ ⌋

Data was collected between the 21st – 25th November 2023. Wholegrain products here include whole meal, brown and 50:50 products. Red cross signifies where the wholegrain equivalent is more expensive than the white ones. N/A signifies where the wholegrain equivalent product is not available. Balance icon signifies where the price of wholegrain equivalent is same as the white product.

↑ LEADERS

1. Sainsbury's and Asda have the largest amount of wholegrain cereal products available, with almost one in four (24%) of staple carbohydrate options at Sainsbury's wholegrain or 50:50 varieties.
2. We looked at the price of wholegrain equivalents for the 10 cheapest white products available for each category. Asda, Co-op and Sainsbury's all have a wholegrain equivalent priced at parity to the white alternative for one of the four carbohydrate categories.

↓ **LAGGARDS**

1. **Iceland** and **Aldi** have the smallest proportion of wholegrain staple carbohydrate options available. Just 5.6% of available pasta, bread, rice and noodle products are categorised as wholegrain or 50:50 at Iceland.
2. **Morrisons** offer no wholegrain equivalents priced at parity with the 10 cheapest white products for any of the four categories we looked at.

ACROSS THE SECTOR

Across all four carbohydrate categories the majority of available options are white, unrefined products. **Just one in six (16%) of all products were wholegrain, brown or 50:50.** It is hardest to find wholegrain or brown options when purchasing noodles, with just 6% of all available noodle options identified as wholewheat or wholegrain.

In all four categories the price of wholegrain and brown products are, on average, higher than the closest comparable white product for the cheapest ten products. Bread loaves have the smallest price difference, with wholegrain, brown and 50:50 products costing an average of 9p more than the nearest white equivalent. The largest price differences can be seen in both the noodle and rice categories; brown or wholegrain rice options cost an average of 77p more than white rice.



RECOMMENDATIONS FOR INDUSTRY:

- Retailers and manufacturers ought to look at increasing the availability of wholegrain options across all staple carbohydrate categories, with a particular focus on the pasta, rice and noodle categories which are currently dominated by white, more refined options.
- Ensuring that wholegrain options are priced the same or below comparable white options is key for incentivising and supporting citizens to make healthier swaps. For example, where offered, multibuy and price promotion deals ought to be on wholegrain carbohydrates rather than HFSS foods.



RECOMMENDATIONS FOR POLICY MAKERS:

- The cost of healthy and sustainable diets should be taken into account when setting benefit levels and the National Living Wage to ensure that low income households are able to afford more nutrient dense foods, such as wholegrains.
- A consistent definition of wholegrain ought to be agreed, to make sure that intakes of wholegrain foods can be more accurately monitored and tracked, and to ensure that health and nutrition claims to citizens are accurate and science-based.
- Following the UK's departure from the EU, the UK ought to review the list of approved claims that can be used to describe the health benefits of fibre to consumers.



GUARANTEE AREA

2 STAPLES



FIRST INFANT FORMULA

Offer an own-brand formula and/or insulate prices on first infant formulas from the worst of inflation.

WHY IT MATTERS

Up until the age of six months, breast milk or first infant formula are a baby's sole source of nutrition and hydration. Safe, nutritionally adequate, and affordable first infant formula is therefore essential where caregivers cannot, or choose not to, provide breastmilk for their infants. Babies are at a high risk of undernutrition, due to their high energy needs during this rapid phase of development. Yet between March 2021 (before food prices started to rise) and April 2023, the seven standard powdered first infant formulas sold by the market leaders increased in cost by an average of 24%, with some brands seeing a much higher rate of inflation of up to 45% (First Steps Nutrition Trust, 2023).



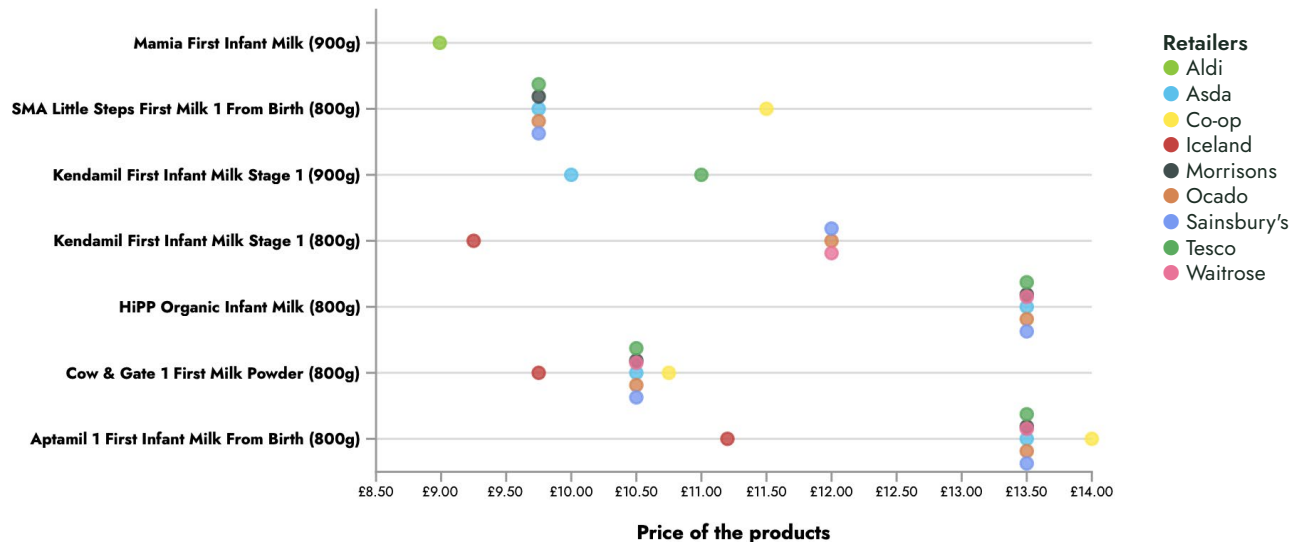
↑ LEADERS

1. **Aldi's** Mamia brand is the only own-brand formula available across all retailers and remains competitively priced. The price for an 900g tin dropped to £8.49 in April 2024, a 10% fall in price since June 2023.
2. In September 2023, **Iceland** discounted all formula sold in their stores. This led to a 7% reduction in price for first infant formula brands. Following this, they also led the market in further reducing the cost of Aptamil after Danone's move to reduce the price of this brand.

↓ LAGGARDS

1. Across the nine major retailers², tins of standard first infant formulas are on average most expensive at **Waitrose**, **Ocado** and **Co-op**.
2. Prices increased at both **Asda** and **Waitrose** for two brands of formula between June 2023 and February 2024.

Cost of Infant Formula Milk Powder(s) per unit/tin: February 2024



Prices are tracked online on 1st February. Several products were out of stock or not available to purchase from some retailers. Where this was the case these brands have been omitted from the graph.

² Aldi, Asda, Co-op, Iceland, Morrisons, Ocado, Sainsbury's, Tesco, and Waitrose.

ACROSS THE SECTOR

Despite being an essential for those reliant on formula, there is a huge range of pricing across different brands of first infant formula, as well as the same brand when stocked across different retailers. Even despite the positive falls in price seen in the past quarter, our data from April 2024 found that the most expensive first infant formula on the market (Co-op's Aptamil 1 First Infant Milk From Birth 800g) is 77% more expensive than the cheapest first infant formula available (SMA Little Steps First Milk 1 From Birth 800g at Tesco), despite all first infant formulas being nutritionally comparable.



RECOMMENDATIONS FOR INDUSTRY:

- Retailers should look to introduce own-brand first infant formulas and/or insulate prices on first infant formula from the worst of food price inflation.
- Retailers can also better promote the Healthy Start scheme to low income customers, which provides funds for low income families with children aged under four to spend on first infant formula and other healthy essentials.



RECOMMENDATIONS FOR POLICY MAKERS:

The pricing of first infant formula should not be left to the market given that there are simply no alternatives for those babies reliant on formula. An inquiry conducted by the CMA in 2023 found that manufacturers have been elevating the price of formula by a greater amount than was necessary to cover inflated input costs, and therefore have maintained high profit margins. Profits on formula were

the greatest of any category investigated by the CMA. A second report looking at the price of formula is expected in September 2024 and the government ought to swiftly implement the recommendations made in this report.

Long-term, the Government ought also to:

- Expand eligibility of Healthy Start to more families in need.
- Increase the value of the Healthy Start allowance.
- Increase uptake of Healthy Start to ensure no eligible families miss out, and make the extension of the scheme to children with no recourse to public funds permanent.
- Clearly signpost and communicate to help families make informed and cost-effective choices. Since all first infant milk formulas are nutritionally comparable, it's important for the government to clearly communicate that families do not need to purchase more expensive products.



Read our [July 2023](#), [October 2023](#), [November 2023](#) and [February 2024](#) reports on first infant formula

Support health for those feeling the squeeze

GUARANTEE AREA

3 KIDS FOOD CATEGORIES



YOGURT

Guarantee that products in two key kid's categories responsible for the majority of sugar intake (yogurts and boxed breakfast cereals) are both healthy and affordable. The cheapest options ought to have the best health profile.

WHY IT MATTERS

Yogurt is a staple item for many families. It provides a valuable source of calcium for young children and is a food that caregivers are often likely to buy in the belief that it is a relatively healthy option. Many yogurts are, however, high in sugar; yogurt is one of the ten main categories contributing to children's sugar intakes (Public Health England, 2017).

↑ LEADERS

1. **Tesco** offer three plain, unsweetened yogurt pot options, with two products coming in at just £0.28 per single pot serving. It has also recently launched two new low sugar yogurts for kids within the Tesco own label brand.
2. **Sainsbury's** and **Asda** both offer the largest number of plain, unsweetened yogurt options across the five largest retailers monitored for this guarantee area.

↓ LAGGARDS

1. **Aldi**. Just one plain, unsweetened single portion yogurt product is available to buy online from Aldi. The cheapest yogurt with the lowest sugar content available at Aldi is also the most expensive option across the five major supermarkets (£0.65 per pot)³.
2. **Manufacturers**. The highest sugar yogurts tend to be branded products rather than supermarket own-label. For example, a Müller branded yogurt (the Müller Bliss Lemon Greek style yogurt) is consistently the cheapest yogurt with the highest sugar content across four of the five major UK retailers, containing six cubes of sugar (five of which are added sugar).



ACROSS THE SECTOR

Overall, we found that although there are single portion yogurts available across the major UK retailers at very low prices (ranging from £0.07 - £0.14 a pot), the very cheapest yogurts are also higher in sugar (9-10g/100g). In contrast, yogurts with the lowest price for the lowest sugar content cost considerably more; between £0.20 - £0.65 a pot for low sugar yogurts containing <5g/100g. Just 9% of single portion yogurt pots can be categorised as being low sugar (<5g/100g).

There is also a dearth of plain, unsweetened yogurts available for sale in single portion pots. We found just 14 plain, unsweetened yogurts sold in single portion pots available across the largest five supermarkets (3.7% of the sample). These also come with a price premium, costing on average 26% more than sweetened and flavoured yogurts, despite being the best option for young children who are recommended to avoid (or have only very limited amounts of) free sugar in their diets.

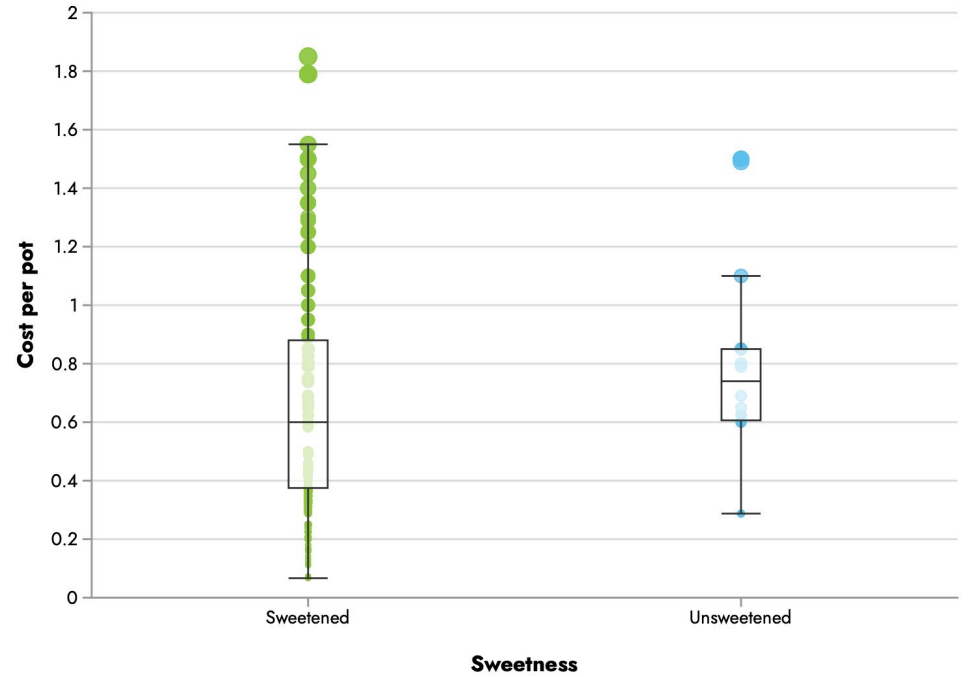
³ Aldi, ASDA, Morrison's, Sainsbury's and Tesco.



Median cost:
Sweetened vs.
Unsweetened yogurt
(August 2023)

Sweetness
● Sweetened
● Unsweetened

Note: Products analysed across retailers in scope.



RECOMMENDATIONS FOR INDUSTRY:

- Increase availability of low-cost, unsweetened yogurts in smaller more convenient pot sizes.
- Shift towards a higher proportion of lower sugar yogurts across the category.



RECOMMENDATIONS FOR POLICY MAKERS:

- Provide an interim update on the progress of the voluntary reformulation programme over the next year, and if progress is still insufficient, explore other options such as fiscal interventions to incentivise change and level the playing field.

Read our
June 2023
and September
2023 reports
yogurts

GUARANTEE AREA

3 KIDS FOOD CATEGORIES



CEREALS

Guarantee that products in two key kid's categories responsible for the majority of sugar intake (yogurts and boxed breakfast cereals) are both healthy and affordable. The cheapest options ought to have the best health profile.

WHY IT MATTERS

Ready-to-eat cereal is a staple item for many families and caregivers and is perceived as a relatively healthy option. Whilst cereal can provide a good source of fibre, many are high in sugar, salt and fat. Cereal is one of the ten main categories contributing to children's sugar intakes (Public Health England, 2017).



↑ LEADERS

Sainsbury's puffed wheat cereal has a low (healthy) NPM score (-6) and costs just 37p per 100g. Their own-label versions of popular cereals are both more affordable and healthier than the branded equivalents, with their version of Shreddies costing five times less than the Nestle version per 100g.

↓ LAGGARDS

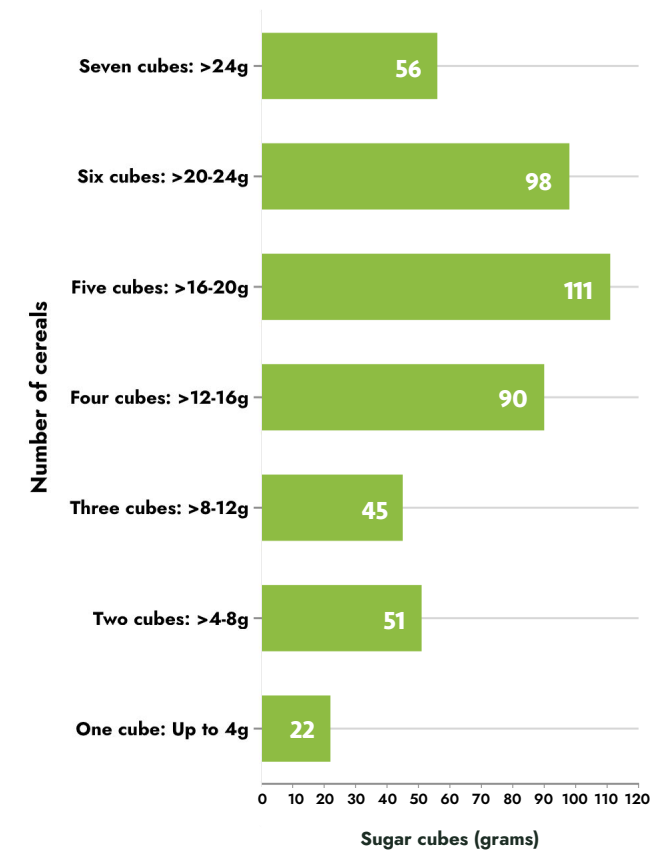
Kellogg's. Branded cereals perform poorly on both price and health profile compared to retailer own-brand products. A Kellogg's branded cereal (Kellogg's Crunchy Nut Granola Chocolate & Hazelnuts) is consistently the cheapest cereal with the highest (worst) NPM score across four of the five major UK retailers. Foods with a score of 4 or more are categorised as being HFSS; the Kellogg's cereal in question has a NPM score of 18.

ACROSS THE SECTOR

Overall, a third of cereals (33%) were high in salt, fat or sugar (HFSS).

Supermarket own-brand cereals offer citizens the most affordable and healthiest options by quite some way, costing just 39p per 100g of cereal on average compared to 65p for branded cereals.

Number of cereals by sugar content/100g: August 2023



Note: Products analysed across retailers in scope namely Aldi, Asda, Morrisons, Sainsbury's, and Tesco.



RECOMMENDATIONS FOR INDUSTRY:

- Manufacturers such as Kellogg's and Nestle who have the largest market share of boxed cereals in the UK must do more to ensure their cheapest cereals have a better health profile. Across the category as a whole, there needs to be a shift towards a higher proportion of lower sugar cereals.



RECOMMENDATIONS FOR POLICY MAKERS:

- Provide an interim update on the progress of the voluntary reformulation programme over the next year, and if progress is still insufficient, explore other options such as fiscal interventions to incentivise change and level the playing field.



GUARANTEE AREA

4 LUNCH BOXES



Lunchbox meal deal. Offer weekly lunchbox items that are compliant with School Food standards and make up 5 lunches that can be bought through a multibuy deal.

WHY IT MATTERS

900,000 children living in poverty in England do not qualify for the government's Free School Meals scheme. Many of these children are unable to afford lunch from the school canteen and instead are reliant on packed lunches (or are unable to afford any food at all). Research shows that less than 2% of packed lunches meet School Food Standards and are a far less nutritious option than school meals. Retailers can play a crucial part in helping families to access and afford healthy lunchbox items.



↑ LEADERS

Tesco offer the best value, at £8.56 for a week's worth of healthy lunchbox items. Tesco have consistently been the most economical place to purchase a healthy packed lunch since we started monitoring this guarantee area at the start of the academic year.

↓ LAGGARDS

Morrisons is the most expensive of the major five supermarkets for families looking to buy healthy lunchbox items. The price of a lunchbox costs £11.72 at Morrisons in May, 37% more expensive than the same items available at Tesco.

Sainsbury's is the second most expensive retailer for buying healthy lunchbox items, and where the biggest increase in cost has been seen. Customers would have to spend 9% more than they did at the start of the academic year in September for the same packed lunch in May.

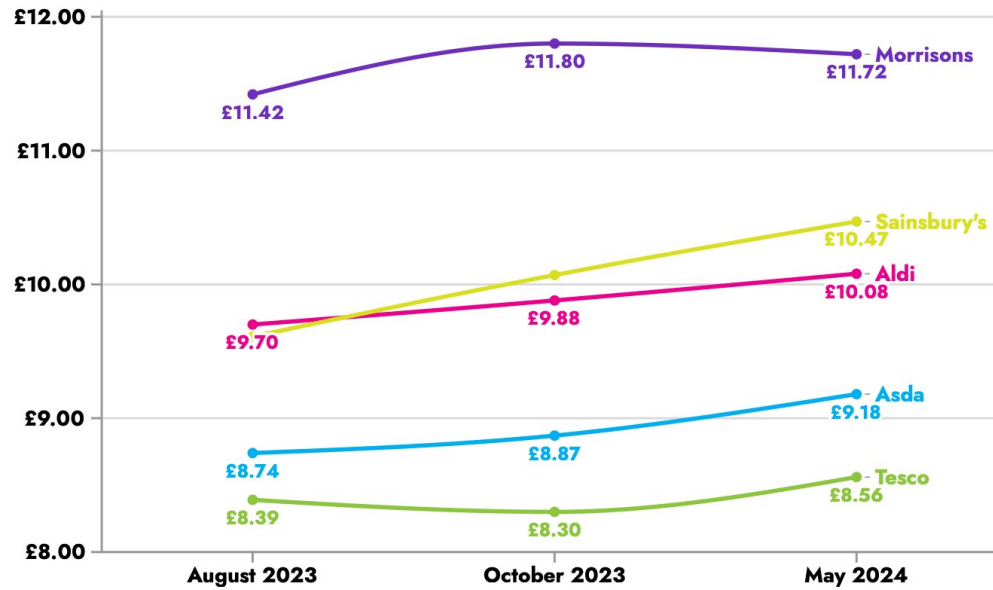
ACROSS THE SECTOR

A reasonably healthy packed lunch can be bought relatively cheaply across UK retailers, but there is room for improvement. For example, no retailer currently has a meal deal for children's lunches even though this would go a long way in helping time-poor families on tight budgets provide their children with a healthy lunch.

The cost of a healthy lunchbox is also more expensive than a less healthy lunchbox.

Our analysis of less healthy lunchbox substitutions (e.g. sweetened yogurt in place of plain, unsweetened yogurt) shows that across all five retailers, the unhealthy packed lunch was notably cheaper. The smallest discrepancy was seen at Tesco where the healthy lunch was just 9% more expensive, compared to Aldi which had the biggest discrepancy, with the healthy lunch being 77% more expensive than the less healthy packed lunch. For families on tight budgets, the sensible economic choice is therefore not the healthier lunch box despite the potential impact of this on children's health.

Price of a healthy packed lunch per week



RECOMMENDATIONS FOR INDUSTRY:

→ Retailers should look to offer lunchbox items that are compliant with School Food standards and make up five lunches that can be bought at affordable price point, for example through a multibuy deal. No retailer currently has such a meal deal but this would go a long way to helping time-poor families on tight budgets to provide their children with a healthy packed lunch.



RECOMMENDATIONS FOR POLICY MAKERS:

→ Expand Free School Meals at least to all children in families in receipt of Universal Credit as a first step towards universal provision.



Read our [September 2023](#), [November 2023](#) and [May 2024](#) reports on lunchboxes.

Rebalance shopping baskets

GUARANTEE AREA

5 HEALTHY START



Act for a healthier, more sustainable future.

WHY IT MATTERS

Healthy Start is a targeted government scheme that provides young pregnant women and low income families with pre-school children aged under four to buy healthy food and first infant formula. The scheme provides a vital nutritional safety net to ensure that low-income children have access to healthy food in the crucial years before they start school. This is particularly important given over a quarter of households with babies and pre-school children are food insecure, with good nutrition in young children playing a critical role in their future health, growth and economic trajectories.



↑ LEADERS

- 1. Iceland.** The business re-labelled all of its own-brand milk and have subsequently labelled over 150 million packs of frozen and fresh fruit and veg with information about the scheme. The retailer has also created special campaign home delivery vans which deliver in areas of low Healthy Start take-up across the UK.
- 2. Sainsbury's.** Between October 2022 and April 2023 Sainsbury's offered £2 top up coupons for Healthy Start customers. Eligible customers automatically received a £2 printed coupon valid when purchasing fresh, frozen and tinned fruit and vegetables. They continue to develop personalised communication approaches that communicate the scheme to relevant customers.
- 3. Co-op.** In 2023 the retailer created an advert for Co-op radio to raise awareness of Healthy Start among their customers. Customers are able to hear the ad while shopping in stores.

↓ LAGGARDS

Aldi and Asda. Despite having a large proportion of customers from lower socio-economic groups, Aldi and Asda were amongst a small group of retailers not to add monetary value to the scheme during the 2020-21 End Child Food Poverty campaign, and have subsequently undertaken little visible marketing or promotional activity to promote the scheme.



 Read our latest
Healthy Start
briefing
[here](#)



RECOMMENDATIONS FOR INDUSTRY:

Retailers ought to continue to promote the Healthy Start Scheme. In lieu of being easily able to add monetary value to the scheme actions to support increased uptake could include:

- Labelling foods included within the scope of Healthy Start with information about the scheme, directing customers towards the NHS website for further information⁴.
- Running targeted in-store and/or online communication campaigns to promote the scheme to low income customers, and those using stores in areas where there are high numbers of families eligible for the scheme and low numbers in receipt of the benefit.
- Exploring the potential to use loyalty card schemes to promote the scheme and incentivize the use of funds on healthy foods.



RECOMMENDATIONS FOR POLICY MAKERS:


- Expand eligibility of Healthy Start to more families in need.
- Increase the value of the Healthy Start allowance.
- Increase uptake of Healthy Start to ensure no eligible families miss out, and make the extension of the scheme to children with no recourse to public funds permanent.

⁴ Excluding first infant formula which is subject to promotional and marketing restrictions



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