Food Standards Scotland

Inbhe Bìdh Alba

Monitoring retail purchase and price promotions in Scotland (2014–2018)

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foodstandards.gov.scot

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i. About Food Standards Scotland

Food Standards Scotland (FSS) is the public sector food body for Scotland. We are here to ensure that information and advice on food safety and standards, nutrition and labelling is independent, consistent, evidence-based and consumer-focused.

Our primary concern is consumer protection – making sure that food is safe to eat, ensuring consumers know what they are eating and improving nutrition. With that in mind, our vision is to deliver a food and drink environment in Scotland that benefits, protects and is trusted by consumers.

FSS was established by the Food (Scotland) Act 2015 as a non-ministerial office, part of the Scottish Administration, alongside but separate from the Scottish Government. We are mainly funded by the government but we also charge fees to recover costs for regulatory functions.

See more at: **foodstandards.gov.scot/about-us**

Food Standards Scotland
4th Floor
Pilgrim House
Aberdeen
AB11 5RL

foodstandards.gov.scot

@FSScot

@FSScot

Prepared by Gillian Campbell, Lyndsay Davidson, Leanne Garden, and Alana McDonald, Nutrition Science and Policy Branch at Food Standards Scotland.

ii. Glossary

Term	Definition
Take home (retail) food and drink purchase	All food and drink purchased for use within the home, i.e. all grocery shopping. This definition excludes takeaway (including home-delivered takeaway food) and any foods that were purchased for immediate consumption outside the home such as a sandwich purchased at a supermarket, or a meal ordered within a restaurant.
Nutritional volume	Calculation of nutrients requires a measure of quantity. In most cases the nutritional volume is kilograms or litres. However for some categories (loose products like cakes, pastries, morning goods and eggs) where pack weights are not available, volume is expressed as number of servings. For the purpose of this report nutritional volume is referred to as volume in the narrative.
Price promotions: ***Temporary price reduction*** ***Y for £X*** ***Multi-buy*** ***Price-marked packs (PMP)*** ***Other promotions***	This includes: *A temporary reduction in the cost of a product, e.g. 10% off.* *An offer of buying a set number of products for a set price, e.g. 2 for £2.* *Including buy one get one free (BOGOF) and 3 for 2 offers.* *Products which include price information as part of the package design.* *Includes extra free deals, meal deals, free gifts and samples.*
Scottish Index of Multiple Deprivation (SIMD)	The SIMD identifies the level of multiple deprivation in small areas across all of Scotland in a consistent way. These areas can then be grouped into quintiles (fifths). Quintile 1 refers to the most deprived area, and quintile 5 refers to the least deprived area.
Income brackets	Refers to household income, as reported by the panellist (however panellists can elect not to provide this information).
Discretionary food and drink	Items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, which aren't required for our health.
Total sugars	Includes sugars naturally present in foods such as fruit, vegetables and cereals, in addition to lactose found in milk products, and any added sugars.
Free sugars	Includes all sugars (monosaccharides and disaccharides) added to foods by the manufacturer, cook or consumer, plus sugars naturally present in honey, syrups and unsweetened fruit juices. Under this definition lactose when naturally present in milk and milk products is excluded.
Energy density	Energy density, also known as calorie density, is the amount of calories in a specific weight of food, e.g. kcals per gram, per 100g or per kilogram.
Branded	Products sold under a branded name from a manufacturer.
Private label	Products sold under a retailer name.

iii. Acronyms

Acronym	Expression
FSS	Food Standards Scotland
BOGOF	Buy one get one free
kcal	Kilocalorie
OOH	Out of home
PMP	Price-marked packs
SIMD	Scottish Index of Multiple Deprivation
SDIL	Soft Drinks Industry Levy
TPR	Temporary price reduction

1. Executive Summary

1.1 Background and methods

Food Standards Scotland (FSS) has a dietary surveillance programme in place to monitor the dietary intakes of the Scottish population and the progress towards the Scottish Dietary Goals.[1] This monitoring data shows that there has been little improvement in the Scottish diet since monitoring began in 2001.[2] The Scottish diet is energy-dense, with too much fat, salt and sugar and too little fibre, fruits, vegetables and oil rich fish.

The FSS dietary surveillance programme also includes monitoring of retail food and drink purchase into the home in Scotland. This current report updates previous key findings[3] with data up to 2018, and provides further insights into price promotions and pack sizes of confectionery and crisps and savoury snacks.

In July 2018, the Scottish Government published 'Scotland's Diet and Healthy Weight Delivery Plan'[4] which outlines a range of actions to improve diet and weight in Scotland, including specific targeted action to improve the balance of promotional activity towards healthier options. This report aims to provide evidence on the purchase and promotion of foods and drinks in Scotland, with an emphasis on discretionary[5] foods.

The data in this report were provided by Kantar who collect data on food and drink purchased into the home from a large consumer panel, including around 2,650 Scottish household panellists in Scotland, who scan all products purchased and brought back into the home. The Kantar sample is chosen to reflect the Scottish population in terms of social class, size and type of household. Data collected from the sample is weighted up to represent all Scottish take home purchasing. Data on volumes purchased are combined with nutrition information from product labels to estimate take home calorie and nutrient purchases. Retailer specific data was provided for the top 8 retailers in Scotland.

The analyses within this report have been conducted by FSS.

1 Scottish Government. Revised Dietary Goals for Scotland – March 2016 (2016): https://www2.gov.scot/Resource/0049/00497558.pdf

2 FSS. Estimation of Food and Nutrient Intakes from Food Purchase Data in Scotland 2001-2015 (2018): https://www.foodstandards.gov.scot/downloads/D19-01_Final_Draft_Report_2001-2015_-_Following_Peer_Review_150818.pdf

3 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

4 Scottish Government. A Healthier Future – Scotland's Diet and Healthy Weight Delivery Plan (2018): https://www.gov.scot/publications/healthier-future-scotlands-diet-healthy-weight-delivery-plan/

5 Discretionary foods are items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, and which aren't required for our health.

1.2 Results

1.2.1 Volumes of nutrients purchased into the home

Data showed a small increase in the purchase of calories per capita (+1.3%) between 2014 and 2018. There has been a decrease in the volume of total sugar purchased over this time (-4.1%). However there have also been increases in the volume of fat (+2.9%), saturated fat (+3.1%) and sodium (+4.0%). This could suggest that the reduction in purchase of sugar is being compensated for with an increase in purchase of fat and saturated fat.

1.2.2 Top 20 food and drink categories contributing to purchase of total calories, total fat, saturated fat, total sugars and sodium in Scotland

Discretionary foods such as confectionery, cakes, biscuits, pastries, crisps and savoury snacks and regular soft drinks together with puddings and desserts, ice cream and edible ices contributed considerably to purchase of calories (25%), total fat (26%), saturated fat (28%), total sugar (40%) and sodium (11%) in 2018.

With the exception of regular soft drinks, there has been little improvement in the contribution of these foods and drinks to purchase of calories, fats, sugar and sodium since 2014.

1.2.3 Sugar purchase

Between 2014 and 2018 there has been a decrease in the purchase of regular soft drinks (-11%), alongside an increase in the purchase of diet soft drinks (+20%), which has led to an overall reduction in purchase of total sugar from soft drinks of around 7,267 tonnes. This has largely been driven by a decrease in the purchase of regular soft drinks subject to the Soft Drinks Industry Levy (>5g/100ml). However, over the same time period there has also been a large increase in purchase of regular soft drinks exempt from the Soft Drinks Industry Levy (<5g/100ml).

There was little indication of reductions in total sugar from most other discretionary categories, in fact there were some increases. For example, since 2014 there has been an increase in the total sugar purchased from confectionery, biscuits and cakes and pastries (4,309 tonnes).

There has been an overall 3% reduction in total sugar purchase from total food and drink between 2014 and 2018, equating to the removal of around 7,225 tonnes of sugar purchased into the home.

The Soft Drinks Industry Levy (SDIL) was implemented in April 2018.

1.2.4 Purchase patterns by area of deprivation Scottish Index of Multiple Deprivation (SIMD) and household income

The results showed that, with decreasing deprivation, spend per 2,000kcal of food and drink increased. Although the differences were small, these data show that households living in the most deprived areas purchased a greater proportion of their calories from biscuits, crisps and savoury snacks, confectionery and regular soft drinks compared with the least deprived. However, those living in the least deprived areas (SIMD 5) purchased a greater proportion of their calories from cakes and pastries, compared to those living in the most deprived areas (SIMD 1).

The results showed that, with increasing household income, spend per 2,000kcal of food and drink increased. Although the differences were small, these data show that households with an income below £20,000 a year purchased a greater proportion of their calories from biscuits, confectionery, puddings and desserts, cakes and pastries and ice cream and edible ices compared to households with an income of more than £60,000 a year. However, households with an income of more than £60,000 a year purchased a greater proportion of their calories from crisps and savoury snacks, compared to households with an income below £20,000 a year.

1.2.5 Price promotions in Scotland

In 2018, 32% of calories were purchased on price promotion, which is a decrease from 41% in 2014 and 2015.

Since 2014, the overall balance of different types of price promotions has not changed. Temporary Price Reductions (TPR) have remained the most common form of price promotion, accounting for 23% of all calories purchased in 2018.

Comparison of purchases on price promotion across a selection of healthier and less healthy categories showed that (with the exception of soft drinks, where the balance of promotion was in favour of diet drinks) in 2018, the less healthy foods tended to be more frequently purchased on promotion than the healthier foods. Overall purchase on price promotion has decreased amongst all categories since 2014. However there have been greater reductions for healthier categories.

These data showed that for the top 8 retailers, purchase on price promotion ranged from 7% to 44% in 2018.

The level of purchase on promotion within individual categories varied considerably by retailer. For example, purchase of confectionery on price promotion ranged from 74% in one of the retailers to only 6% in another.

1.2.6 Branded and private label products

The majority of products purchased into the home in 2018 were private label products (64%, versus 36% branded products). However, branded products were purchased more on promotion than private label products.

1.2.7 Pack sizes of crisps and savoury snacks and confectionery

These data showed that despite the increasing volumes of crisps and savoury snacks purchased between 2014 and 2018, the average pack sizes of most pack types have decreased.

Volumes of confectionery purchased between 2014 and 2018 increased, but there has been little change in the average pack size of most pack types of confectionery.

1.3 Conclusion

The reduction in overall purchase of sugar since 2014 is welcome. However this must be viewed as part of the bigger picture as there have been increases in the purchase of total fat, saturated fat and sodium over the same time period. Further monitoring will be required to ascertain if these changes in purchase patterns are reflected in dietary intakes. Discretionary foods continue to contribute disproportionately to total purchase of calories, fats and sugars, and there has been little change since 2014.

The results demonstrate a positive overall change within regular soft drinks, which has contributed to the overall reduction in sugar purchased in Scotland between 2014 and 2018. However, the rapid increase in both the purchase and average sugar content of drinks exempt from the levy (<5g/100ml) is notable and FSS will continue to monitor this trend.

Promotions overall have declined since 2014, and in 2018, around a third of the retail food and drink purchased in Scotland was on a price promotion. Purchase on promotions remains skewed towards less healthy and discretionary products, which could have implications for population weight gain and risk of diet related diseases, and highlights the need for change.

This report complements and adds to the evidence base which supports action to limit the availability, advertising and promotion of high fat/salt/sugar products, as recommended by FSS.[6]

6 FSS. Proposals for setting the direction for the Scottish diet, one year on (2017): https://www.foodstandards.gov.scot/downloads/Board_meeting_-_2017_March_08_-__Diet_and_Nutrition_one_year_on_0.pdf

2. Introduction

Food Standards Scotland (FSS) has a dietary surveillance programme in place to monitor the dietary intakes of the Scottish population and progress towards the Scottish Dietary Goals.[7] This monitoring data shows that there has been little improvement in the Scottish diet since 2001,[8] with the exception of salt which has reduced by 13% between 2006 and 2014.[9] The Scottish diet is energy dense, with too much fat, salt and sugar and too little fibre, fruits, vegetables and oil rich fish.

The FSS dietary surveillance programme also includes monitoring of retail food and drink purchase into the home in Scotland. FSS has previously published data on take home food and drink purchase in Scotland, with data up to September 2016.[10] This current report updates previous key findings with data up to 2018, and provides further insights into price promotions, and pack sizes of confectionery and crisps and savoury snacks.

In January 2016, the FSS Board agreed a broad package of measures, applicable to both the food and drink industry and to consumers, to help tackle poor diet and obesity levels in Scotland.[11] A further five recommendations were proposed in March 2017,[12] including a recommendation that availability, advertising and promotions of high fat/salt/sugar products be limited. In July 2018, the Scottish Government published 'Scotland's Diet and Healthy Weight Delivery Plan'[13] which outlines a range of actions to improve diet and weight in Scotland, including specific targeted action to improve the balance of promotional activity towards healthier options. This report aims to provide evidence on the purchase and promotion of foods and drinks in Scotland, with an emphasis on discretionary[14] foods.

7 Scottish Government. Revised Dietary Goals for Scotland – March 2016 (2016): https://www2.gov.scot/Resource/0049/00497558.pdf

8 FSS. Estimation of Food and Nutrient Intakes from Food Purchase Data in Scotland 2001-2015 (2018): https://www.foodstandards.gov.scot/downloads/D19-01_Final_Draft_Report_2001-2015_-_Following_Peer_Review_150818.pdf

9 FSS. National Diet and Nutrition Survey: Assessment of dietary sodium (2016): https://www.foodstandards.gov.scot/publications-and-research/publications/national-diet-and-nutrition-survey-assessment-of-dietary-sodium

10 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

11 FSS. Proposals for setting the direction for the Scottish diet (2016): https://www.foodstandards.gov.scot/downloads/Diet_and_Nutrition_Proposals_for_setting_the_direction_for_the_Scottish_Diet_1.pdf

12 FSS. Proposals for setting the direction for the Scottish diet, one year on (2017): https://www.foodstandards.gov.scot/downloads/Board_meeting_-_2017_March_08_-__Diet_and_Nutrition_one_year_on_0.pdf

13 Scottish Government. A Healthier Future – Scotland's Diet and Healthy Weight Delivery Plan (2018): https://www.gov.scot/publications/healthier-future-scotlands-diet-healthy-weight-delivery-plan/

14 Discretionary foods are items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, and which aren't required for our health.

3. Aims

This report presents:

- Trends (2014-18) in the total take home purchase of calories and nutrients in Scotland
- The top 20 food and drink categories in 2018 contributing to purchase of:
  - Total calories
  - Total fat
  - Saturated fat
  - Total sugar
  - Sodium
- Trends (2014-18) in total take home purchase of discretionary food categories
- Total sugar purchase by categories in Scotland
- Purchase patterns of discretionary food categories in relation to Scottish Index of Multiple Deprivation (SIMD) and household income
- Proportion of take home calories and nutrients purchased on price promotion
- Purchase on price promotion of a selection of healthier vs less healthy food and drink categories
- Purchase of calories and discretionary food categories on price promotion by Scottish Index of Multiple Deprivation (SIMD) and household income
- Purchase patterns in relation to price promotions by retailer
- Purchase of branded and private label products
- Purchasing patterns in relation to pack sizes and pack types for confectionery and savoury snacks

4. About the report

The data presented within this report was commissioned by FSS and provided by Kantar. Analyses and reporting of data was carried out by FSS in collaboration with Kantar.

The data presented relates to the retail environment and refers to take home purchases, i.e. excludes takeaway (including home-delivered takeaway food) and any foods that were purchased for immediate consumption outside the home such as a sandwich purchased at a supermarket, or a meal ordered within a restaurant. Evidence suggests spend out of home (OOH) is increasing and provides around 25% of our calories.[15]

The data presented includes purchase data only and this does not necessarily equate to consumption, as factors such as waste and cooking losses are not accounted for.

Trends in purchase and promotion are presented between 2014 and 2018.

Retailer specific data is presented for the top 8 retailers (Tesco, Asda, Morrisons, the Co-operative, Sainsbury's, Aldi, Lidl and Marks & Spencer) who, in 2018, contributed 88% of total take home spend and 87% of all calories purchased into the home in Scotland. Data on specific retailers outwith the top 8 retailers are not presented. However, they are captured within the results for total Scotland.

Section 12 of the report presents analyses of 'healthier' and 'less healthy' categories. Classification of categories as 'healthier' and 'less healthy' was based on current dietary recommendations[16] and evidence around contributions to dietary intakes[17] and contribution to purchase and data on promotions.[18] These categories were:

Healthier:

- Diet soft drinks
- Water
- Total fruit
- Total vegetables and salad leaves
- Plain oil rich fish
- Plain starchy carbohydrates
- Plain bread
- Plain potatoes

Less Healthy:

- Ice cream and edible ices
- Puddings and desserts
- Total biscuits
- Total cakes and pastries
- Total regular soft drinks
- Regular soft drinks exempt from the levy (<5g/100g)
- Regular soft drinks subject to the levy (>5g/100g)
- Total confectionery
- Savoury pies and pasties
- Sausages
- Crisps and savoury snacks

15 Public Health England. Sugar Reduction: Achieving the 20% A technical report outlining progress to date, guidelines for industry, 2015 baseline levels in key foods and next steps (2017): https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/604336/Sugar_reduction_achieving_the_20_.pdf

16 FSS. The Eatwell Guide (2016): https://www.foodstandards.gov.scot/publications-and-research/publications/eatwell-guide-booklet

17 FSS. Estimation of Food and Nutrient Intakes from Food Purchase Data in Scotland 2001-2015 (2018): https://www.foodstandards.gov.scot/downloads/D19-01_Final_Draft_Report_2001-2015_-_Following_Peer_Review_150818.pdf

18 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

5. Kantar: data collection and methodology

Kantar collects data on purchases into the home in Scotland for all food and drink from a large Great Britain household consumer panel of around 30,000 panellists on an on-going basis. The Kantar sample is chosen to reflect the Scottish population in terms of social class, size and type of household. Data collected from the sample is weighted to represent all Scottish take home purchasing.

Since publication of the previous report showing data up to 2016, Kantar made changes to improve the way they weight and measure Scotland, as well as other regions in GB. This means that the standard Kantar definition now captures data on Scotland only, rather than Scotland and Borders. This has resulted in a change to the weightings of the volumes purchased in the Scottish region. Data have been updated with the revised definition from 2014 only. As a result, previously published figures are not directly comparable with those presented in this report. However, the overall findings and trends in purchase of calories, nutrients and individual categories are comparable.

Data used within this analysis was collected between January 2014 and January 2019, from around 2,650 Scottish household panellists each year. All food and drink products (around 100,000) purchased are categorised into around 340 sub-categories.

FSS regularly review the food and drink categories and as a result have made some changes to the categories included within this report:

- Previous reporting monitored ambient soft drinks only. This report includes both ambient and chilled soft drinks.
- In the previous report ice cream was monitored as a separate category to edible ices and frozen dairy desserts. This report combines ice cream and edible ices into a single category. Frozen dairy desserts are now captured within the wider puddings and desserts category.

Nutritional composition data from food labels is also collected and regularly updated. This allows assessment of changes over time in the volume purchase and related nutritional composition of individual food and drink categories including those on promotion, and assessment of the total purchase of calories, fats, sugar and salt into the home in Scotland.

Data on calories, protein, total carbohydrate, total sugar, total fat, saturated fat, dietary fibre and salt is collected from package labels and updated every four months. Data on content from the label (sourced from fieldwork, product samples, product packaging images and those copied across from different pack sizes), were available for over 66% of products (78% of volume) with the remaining imputed from similar products. In some cases, for non-bar-coded products where package label data was not found (less than 1% of products), published values from generic data derived from national food composition tables was used. For some product categories, which tend to be sold loose (bread, rolls, morning goods, cakes and pastries), calorie and nutrient content values were provided per serving rather than per 100g due to the lack of information on the weight of the product. The strength of using the nutritional information from product packaging is that it is frequently updated by Kantar and is likely to reflect any recent changes in the household product mix and in the nutritional composition of the products. However this relies on the accuracy of nutritional labelling.

Data on volumes purchased (based on the consumer panel records) is combined with product nutritional information to estimate the calorie, total fat, saturated fat, total sugar and sodium contribution for all categories and in relation to total purchase. Annual purchase data for Scotland was also converted to daily per capita purchases, to help take account of changes in the size of the Scotland population and to provide information on trends in an easier to understand format. No weighting was done for changes to the profile of the population in terms of age and sex.

Price promotion data is also recorded by panellists. Types of promotional data collected by Kantar include "temporary price reduction" (TPR), "Y for £X", "multi-buy", "price-marked packs" and "other promotion" (see Glossary for definitions). These data have been used to assess and monitor price promotion activity, particularly in relation to less healthy and discretionary categories.

Kantar track their data regularly against published retailer data to ensure the data is reflecting known trends and, because this data is sold to many manufacturers and retailers who provide ongoing feedback on the quality of the data, they are able to make adjustments and ensure they are providing the most accurate measure of the grocery market possible.

6. Confidence intervals and statistical analyses

Previous FSS analysis of data from Kantar has not included the calculation of confidence intervals and therefore testing of statistical significance, as it was advised that traditional methods for carrying out such calculations were not suitable due to the non-random nature of the Kantar sample.

As part of FSS collaboration with Kantar to produce the previous report,[19] possible alternative options for calculating confidence intervals for annual trend data were explored and submitted for consideration and discussion to peer reviewers with expertise in statistics. Following peer review, it was advised that it was unlikely that any of the options proposed would overcome the fundamental issue of non-random samples and therefore recommended that this was not taken forward. However, the conclusions from the peer review group were that the methodology used by Kantar was sufficiently robust (discussed under "Strengths" in section 16), and that statistical approximations to confidence intervals would not necessarily provide any additional robustness in this case.

Rather than attempting to ascertain significance of particular trends, it was the view of the peer review group that results should be considered and bolstered by other sources of evidence (including FSS evidence on dietary intakes) and that results should be framed in the context of long term direction of travel.

19 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

7. Volumes of nutrients purchased into the home

Table 1 below presents the calories and nutrients purchased per capita[20] into the home from food and drink in Scotland between 2014-18. The data presented shows that there has been a small increase in take home purchase of calories, with an increase of 1.3% since 2014. There has been a decrease in the volume of total sugar purchased by 4.1% since 2014, with the reduction largely being seen between 2017 and 2018.

However, the volume of fat and saturated fat purchased since 2014 has increased by 2.9% and 3.1% respectively, and the volume of sodium purchased since 2014 has increased by 4.0%.

Table 1:
Annual take home purchase of calories, sugars, fats, and sodium per capita in Scotland (2014-18)

Per capita, per day	2014	2015	2016	2017	2018	% change since 2014
Energy (kcal)	2208	2178	2203	2234	2237	1.3
Total sugar (g)	125	123	123	124	120	-4.1
Fat (g)	88	87	88	89	90	2.9
Saturated fat (g)	34	34	34	35	35	3.1
Sodium (g) excluding from table salt (g)	2.5	2.5	2.5	2.6	2.6	4.0
Salt (g)	6.3	6.3	6.2	6.5	6.6	4.0

20 The per capita analysis does not account for differences by age, sex or household composition but it does allow for changes in the total numbers in the population of Scotland to be accounted for.

8. Top 20 food and drink categories contributing to purchase of calories, total fat, saturated fat, total sugars and sodium in Scotland

Annexe 1 provides the top 20 food and drink categories contributing to total purchase of calories, total fat, saturated fat, total sugar and sodium in 2018, alongside a comparison of their contributions in 2014. Definitions for the top 20 contributing categories are provided in annexe 2. The top 20 categories represented the majority of purchase into the home in Scotland in 2018.

Discretionary products such as cakes, pastries, biscuits, confectionery, crisps and savoury snacks and regular soft drinks (see table 2 below) were amongst the top contributors to take home purchase of calories in 2018, together contributing 23.1%. Outwith the top 20 contributors, puddings, desserts, ice cream and edible ices contributed an additional 2.2% to purchase of calories in 2018. Similarly, these products contributed around 26% to total purchase of total fat, 28% to total purchase of saturated fat, 40% to total purchase of total sugar and 11% to total purchase of sodium in 2018.

Table 2:
Contribution of discretionary foods to purchase of total calories, total fat, saturated fat, total sugar and sodium in Scotland, 2018

Category	% contribution in 2018 to purchase of:				
	Calories	Total Fat	Saturated Fat	Total Sugar	Sodium
Cakes and pastries	4.5%	4.4%	4.6%	6.1%	2.2%
Total biscuits	6.8%	7.2%	9.1%	7.5%	3.3%
Total ambient take home confectionery	5.7%	5.8%	8.6%	12.9%	0.9%
Crisps and savoury snacks	4.0%	5.7%	1.7%	0.6%	3.5%
Regular soft drinks	2.1%	0.1%	0.2%	8.3%	0.5%
Puddings and desserts	1.2%	1.1%	1.7%	2.2%	0.4%
Ice cream and edible ices (excl. frozen dairy desserts)	1.0%	1.2%	2.1%	1.9%	0.2%
TOTAL	25.2%	25.5%	28.0%	39.5%	11.1%

The data also shows some small changes over time in the contribution of these categories to purchase of calories and nutrients. For example, contribution of confectionery to purchase of calories has increased since 2014, whilst contribution of regular soft drinks to purchase of calories has decreased since 2014.

9. Trends in annual purchase into the home in Scotland of discretionary categories between 2014 and 2018

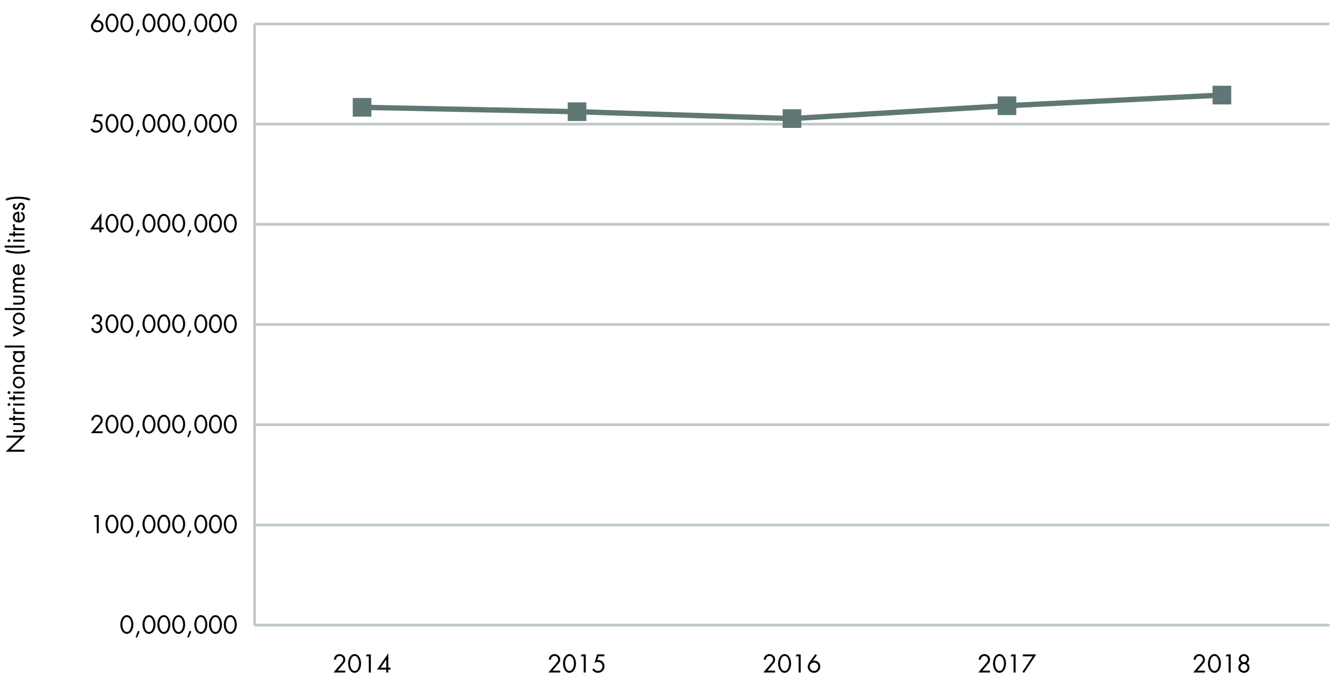
In addition to presenting trends in total food and drink purchase since 2014, this section includes trends in the purchase of discretionary foods. These types of foods and drinks contribute considerably to purchase of calories, fats, sugar and salt as demonstrated in section 8.

Since 2014, the total volume of food and drink purchase has increased by 6.6%. Some of this increase relates to increases in the population of Scotland (+1.2%).[21] An increase in purchase greater than 1.2% would therefore suggest an increase in purchase per capita.

9.1 Soft Drinks

Overall, the volume of total soft drinks purchased has increased by 2.4% since 2014 (figure 1), to almost 529 million litres in 2018.

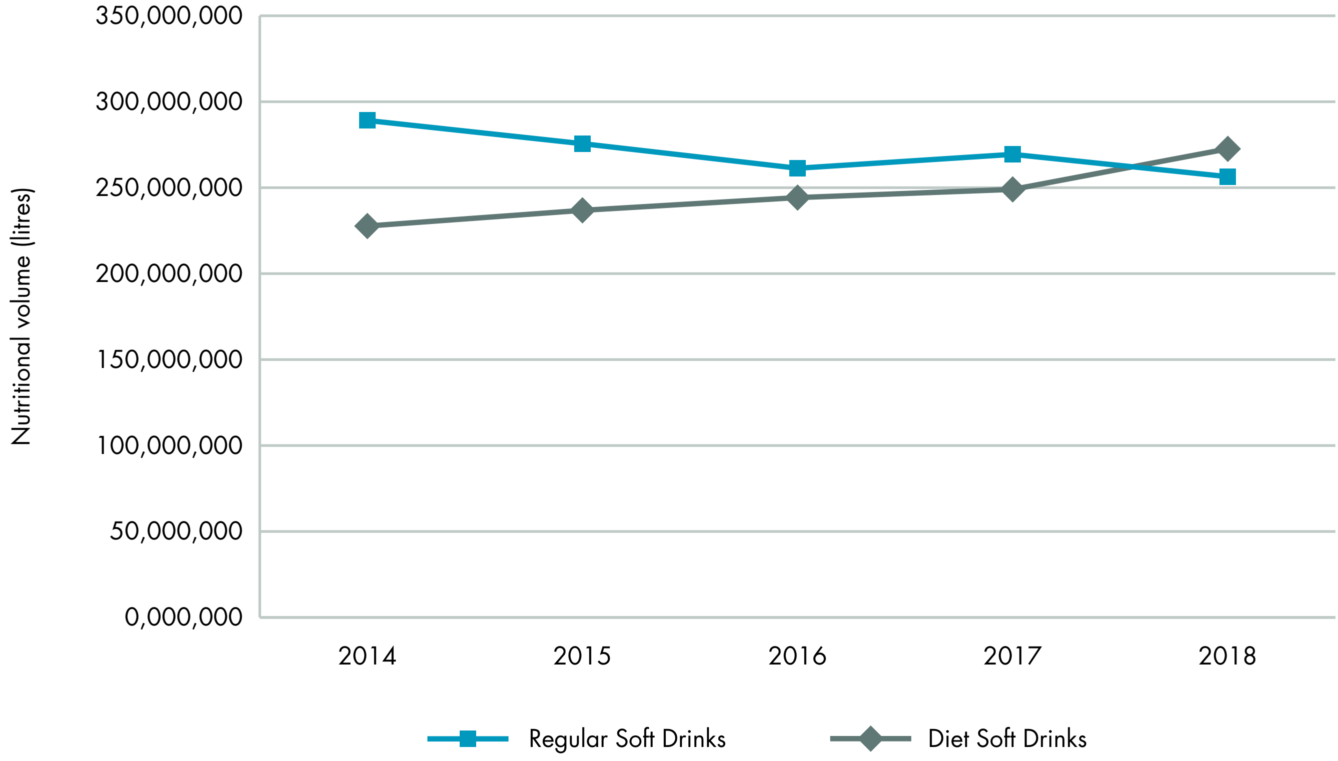
Figure 1:
Annual purchase of total soft drinks into the home in Scotland (2014-18)



21 Per capita trends in calorie and nutrient purchase have been provided in section 7.

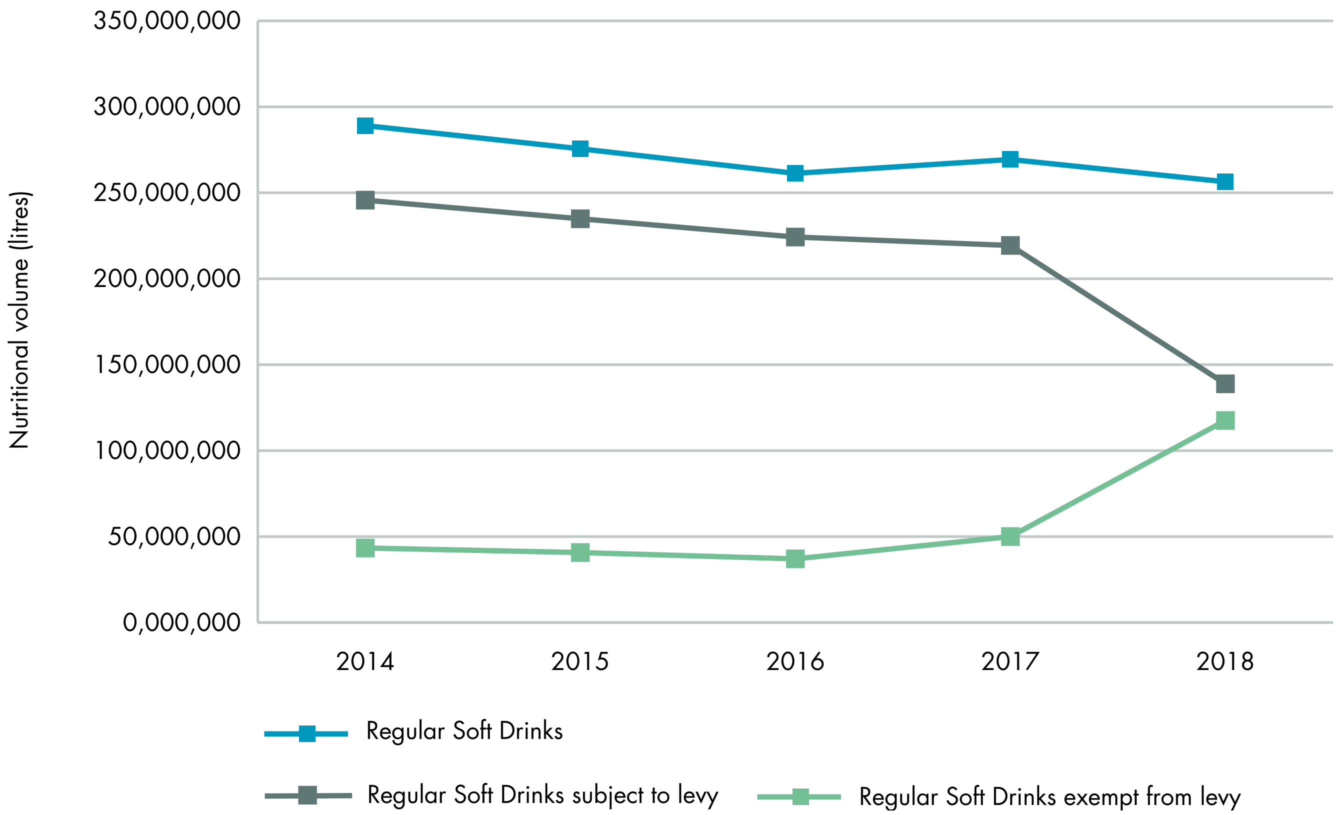
Overall purchase of regular soft drinks has declined since 2014 by 11% to around 256 million litres (figure 2). Purchase of diet soft drinks has increased by around 20% since 2014, to over 272 million litres in 2018.

Figure 2:
Annual purchase of regular and diet soft drinks into the home in Scotland (2014-18)



UK Government introduced the Soft Drinks Industry Levy (SDIL) in April 2018. Monitoring has now been set up to assess the purchase of regular soft drinks, with a sugar content above and below the levy threshold (5g/100ml). Since 2014, purchase of regular soft drinks exempt from the levy has increased by 171% to over 117 million litres, and purchase of regular soft drinks subject to the levy has decreased by 44% to around 138 million litres (figure 3). These changes largely occurred between 2017 and 2018.

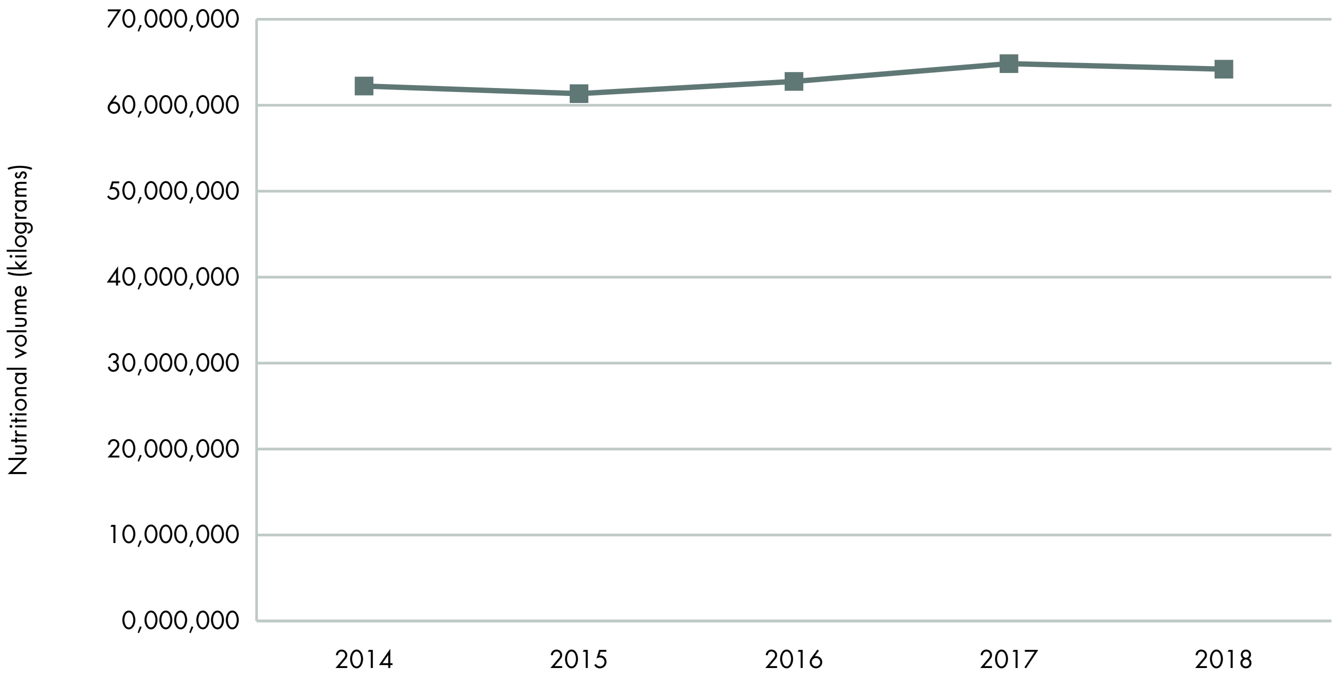
Figure 3:
Annual purchase of total regular soft drinks, and regular soft drinks exempt from and subject to the levy, in Scotland (2014-18)



9.2 Biscuits

Figure 4 shows that there has been an increase of 3.1% in the volume of biscuits purchased since 2014, with around 64 million kilograms of biscuits purchased in 2018.

Figure 4:
Annual purchase of biscuits into the home in Scotland (2014-18)

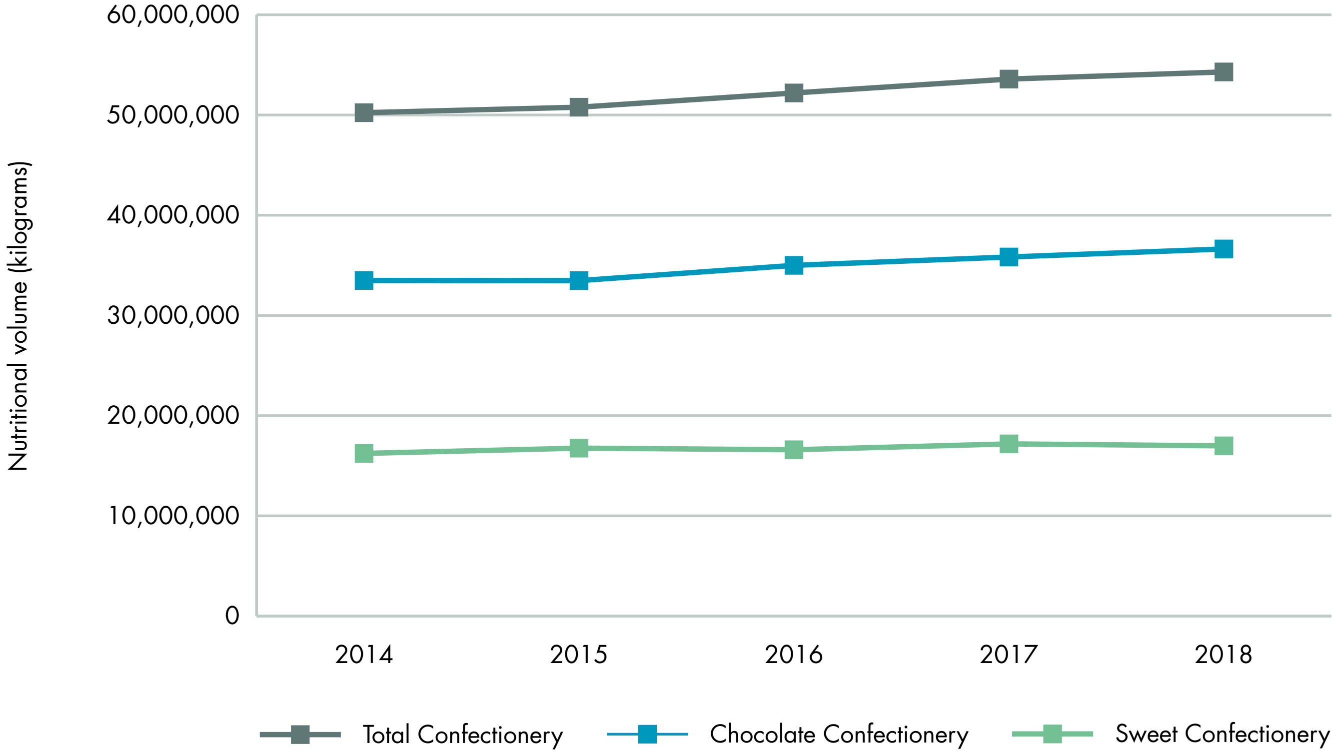


9.3 Confectionery

As illustrated in figure 5, purchase of total confectionery has increased by 8.1% since 2014, from around 50 million kilograms in 2014 to 54 million kilograms in 2018.

Within total confectionery, purchase of chocolate confectionery has increased by 9.4% and sweet confectionery by 4.6% since 2014.

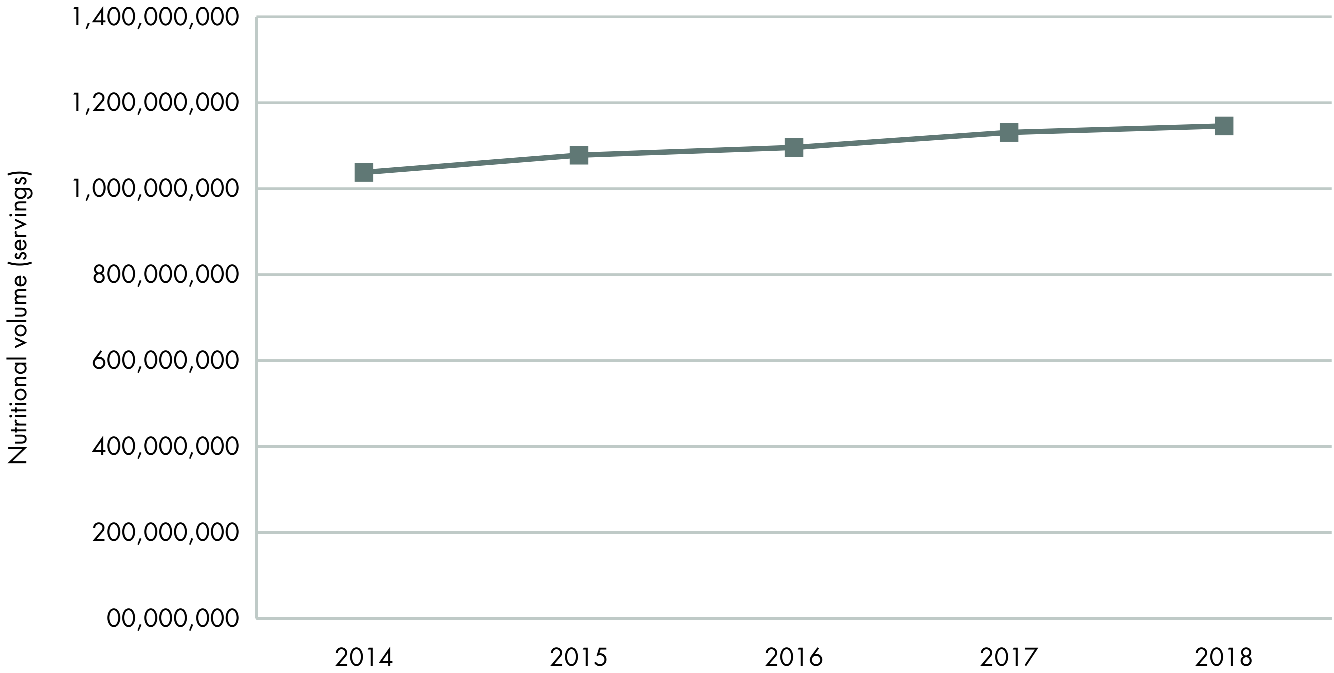
Figure 5:
Annual purchase of confectionery into the home in Scotland (2014-18)



9.4 Cakes and pastries

As illustrated in figure 6 below, there were over 1.1 billion servings[22] of cakes and pastries purchased in 2018, compared with around 1 billion servings purchased in 2014, an increase of around 10%.

Figure 6:
Annual purchase of cakes and pastries into the home in Scotland (2014-18)

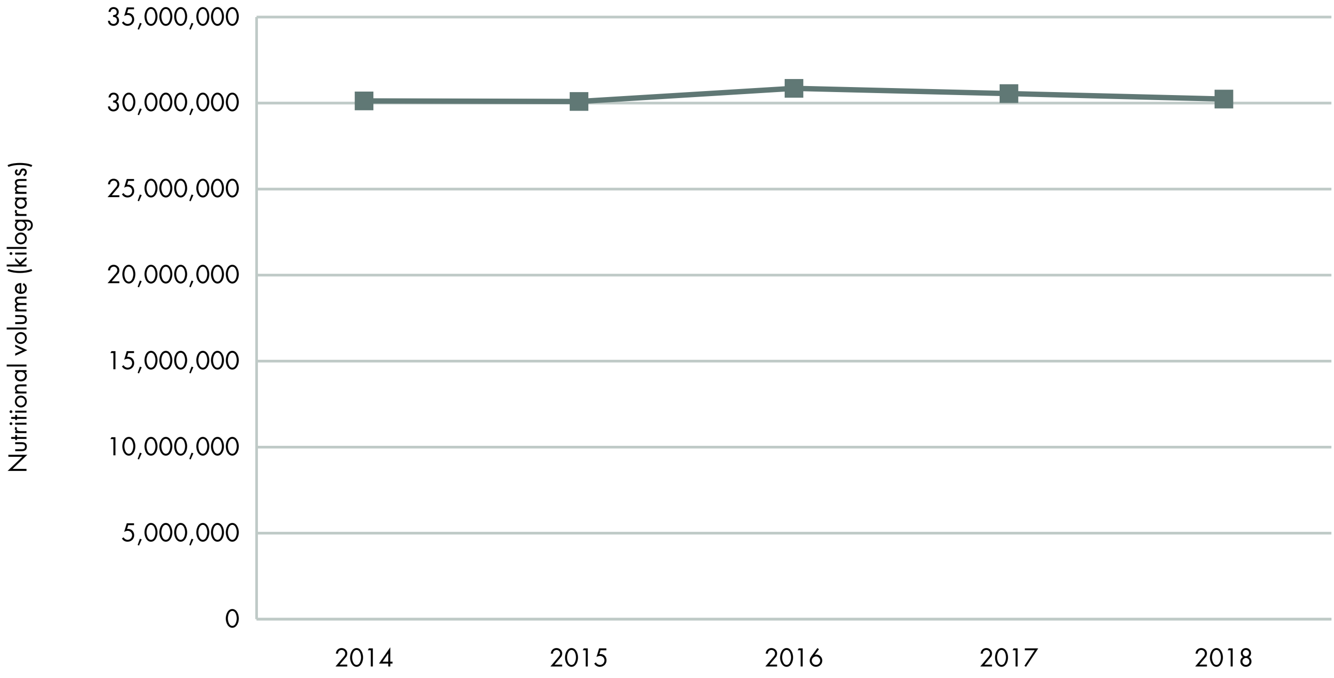


22 For cakes and pastries data is provided per serving rather than per kilogram.

9.5 Puddings and desserts

Overall, since 2014, there has been little change in the purchase of puddings and desserts with purchase remaining around 30 million kilograms (figure 7).

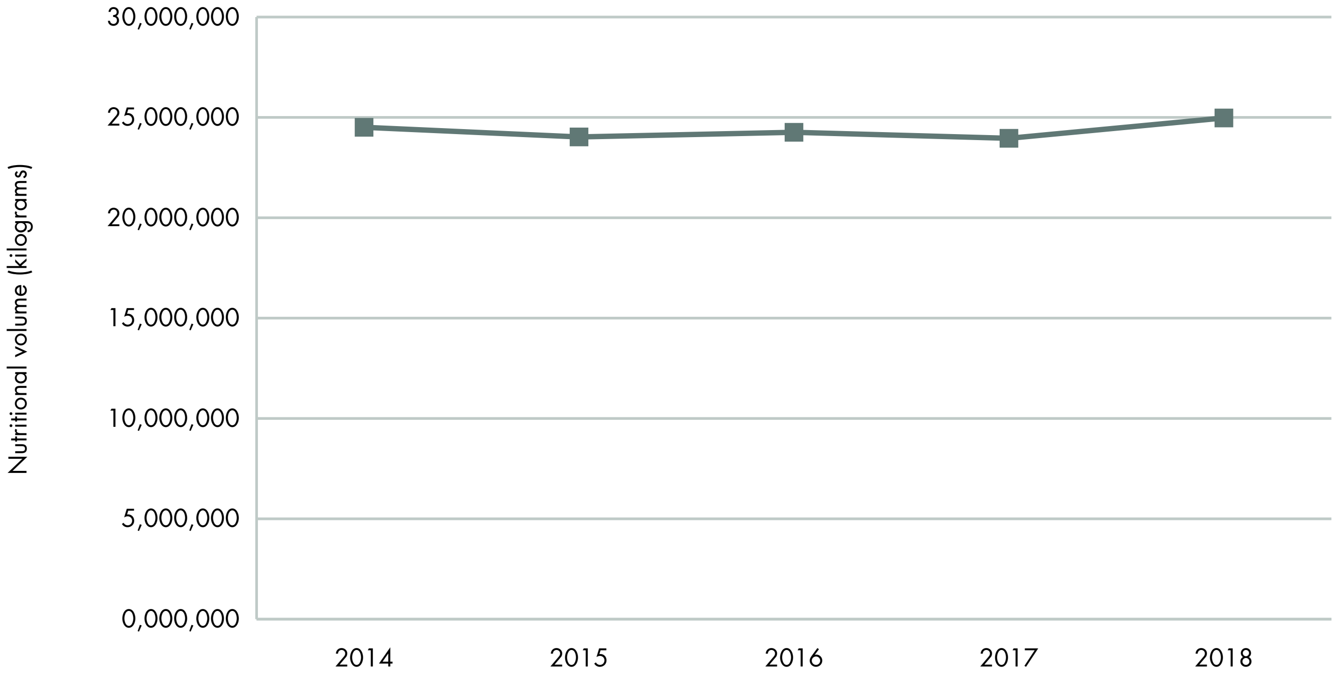
Figure 7:
Annual purchase of puddings and desserts into the home in Scotland (2014-18)



9.6 Ice cream and edible ices

Purchase of ice cream and edible ices has increased by around 1.9% since 2014, to almost 25 million kilograms in 2018 (figure 8).

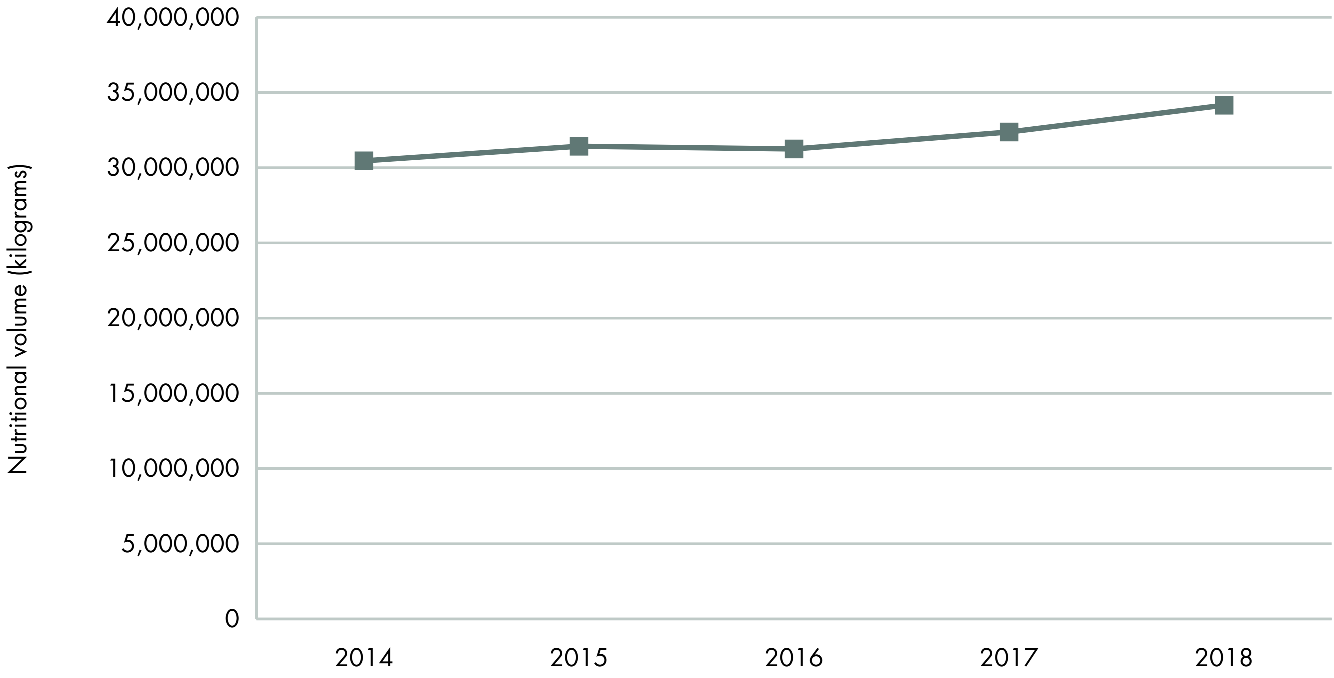
Figure 8:
Annual purchase of ice cream and edible ices into the home in Scotland (2014-18)



9.7 Crisps and savoury snacks

Purchase of crisps and savoury snacks has increased from just over 30 million kilograms in 2014, to around 34 million kilograms in 2018, representing a 12% increase (figure 9).

Figure 9:
Annual purchase of crisps and savoury snacks into the home in Scotland (2014-18)



9.8 Summary

Overall, purchase of most of the discretionary categories has increased between 2014 and 2018 including biscuits, confectionery, cakes and pastries, ice cream and edible ices and crisps and savoury snacks.

The main exception to this is regular soft drinks, where there has been an 11% reduction in volumes purchased. This has largely been driven by reduction in the purchase of regular soft drinks subject to the SDIL. However, there has also been a rapid and notable increase in the purchase of regular soft drinks exempt from the SDIL.

10. Total sugar purchase by categories in Scotland

10.1 Top 20 contributors to total sugar purchase in Scotland (2014-18)

Table 3 below shows the top 20 contributors to sugar purchase alongside the total take home sugar purchase in Scotland. The percentage change in total sugar purchased (column C) takes account of both the change in volume purchased (column A) and any change in total sugar content from each category (g per 100g, column B).

The data shows that although there are large reductions in total sugar purchase from some categories (such as total alcohol, regular soft drinks, table sugar, breakfast cereals, savoury home cooking and sweet home cooking), there are also large increases in sugar purchase from others (including bread and morning goods, ready meals, cakes and pastries and confectionery).

This could be due to increases in volume purchase, changes in the composition of particular products within a category and/or a shift in purchase towards higher sugar products within a category.

However, there has been an overall 3% reduction in total sugar purchase from total food and drink since 2014, equating to the removal of around 7,225 tonnes of sugar.

Within the top 20 contributors to total sugar purchase there has been a net reduction of 7,829 tonnes of sugar since 2014. This is greater than the overall reduction in sugar purchase of 7,225 tonnes from total food and drink since 2014. This would therefore suggest that there has been an increase in sugar purchase from categories outwith the top 20 contributors between 2014 and 2018.

Table 3:
Change in total nutritional volume and total sugar purchase of top 20 contributors (2014 vs 2018)

	Category	Column A % change in nutritional volume	Column B % change in sugar g/100g	Column C % change in total sugar
	Total Food and Drink	6.6	-9.0	-3.0
1	Total fruit	7.4	-2.6	4.6
2	Total ambient take home confectionery	8.1	0.3	8.5
3	Total milk	3.0	-0.9	2.1
4	Table sugar	-15.0	0.1	-14.9
5	Regular soft drinks	-11.3	-17.2	-26.6
6	Total biscuits	3.1	1.1	4.3
7	Cakes and pastries	10.3	-1.3	8.9
8	Total bread and morning goods	4.1	7.8	12.2
9	Total vegetables and salad leaves	13.4	-2.7	10.3
10	Sweet home cooking (excl. sugar)	-5.0	-3.8	-8.6
11	Total breakfast cereals (incl. rolled oats and oatmeal)	-1.8	-12.8	-14.4
12	Pure fruit juice	1.5	-4.7	-3.3
13	Breakfast spreads	1.2	-3.6	-2.4
14	Total yoghurt	9.7	-14.0	-5.7
15	Total puddings and desserts	0.4	-3.0	-2.6
16	Ice cream and edible ices (excl. frozen dairy desserts)	1.9	-7.7	-5.9
17	Total pickle, table sauce and condiment	15.9	-8.5	6.1
18	Total alcohol	1.3	-34.2	-33.3
19	Savoury home cooking (excl. salt)	-0.3	-8.9	-9.2
20	Ready meals	8.7	0.3	9.1

10.2 Total sugar purchase from soft drinks in Scotland (2014-18)

Table 4 below shows the change in total sugar purchase of different types of soft drinks since 2014.

Since 2014, there has been a large decrease in sugar purchase from regular soft drinks subject to the levy (>5g/100ml). The data suggests that this has been driven by a reduction in the volume purchased (-43.5%) with only a small decrease in sugar per 100g (-3.6%).

Over the same time period there has also been a large increase in sugar purchase from regular soft drinks exempt from the levy (<5g/100ml). This has resulted from an increase in both the volume purchased (+171%) and sugar per 100g (+43.1%).

However, overall total sugar purchase from total soft drinks has reduced by around 26% since 2014, a reduction of 7,267 tonnes of sugar.

Table 4:
Change in total nutritional volume and total sugar purchase of soft drinks (2014 vs 2018)

Category	Column A % change in nutritional volume	Column B % change in sugar g/100g	Column C % change in total sugar
Regular soft drinks	-11.3	-17.2	-26.6
Regular soft drinks subject to the levy (>5g/100ml)	-43.5	-3.6	-45.5
Regular soft drinks exempt from the levy (<5g/100ml)	171.0	43.1	287.6
Total soft drinks	2.4	-27.5	-25.8

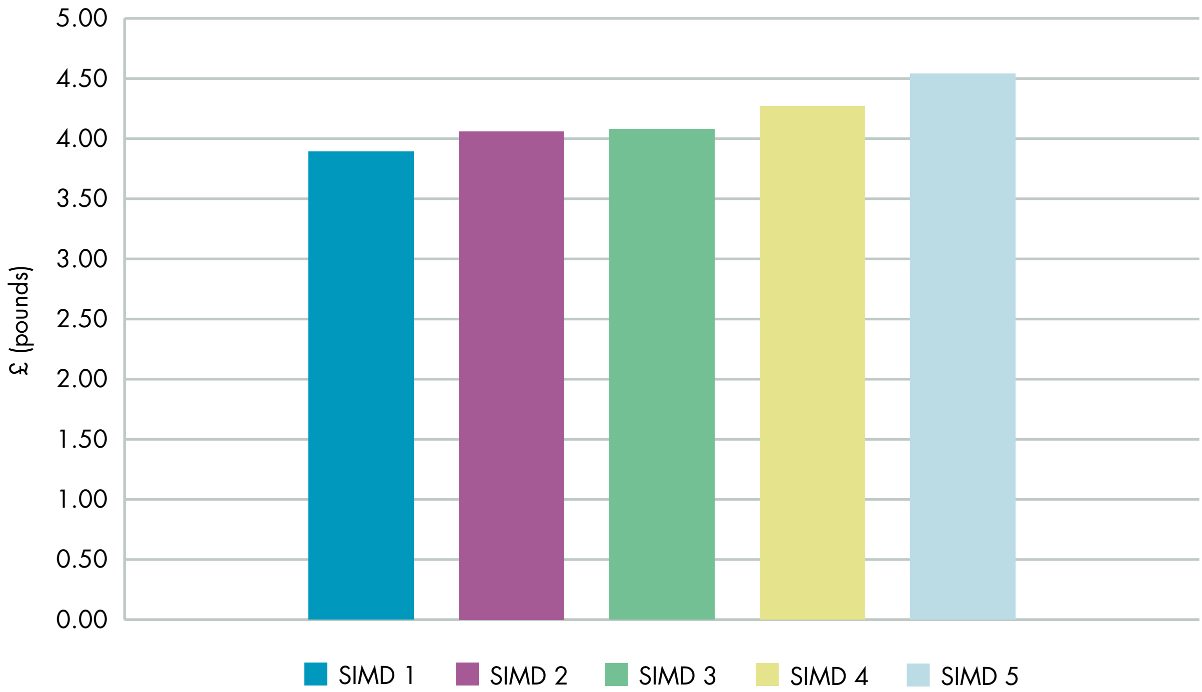
11. Purchase of discretionary categories by Scottish Index of Multiple Deprivation and Household Income

11.1 Scottish Index of Multiple Deprivation (SIMD)

SIMD takes into account income in addition to other locational and demographic factors such as health, housing, education, employment and crime.

Figure 10 below shows the difference in spend (per 2,000kcal[23]) on food and drink by SIMD quintile in 2018. The results showed that, with decreasing deprivation, spend per 2,000kcal of total food and drink increased, with households living in the most deprived areas (SIMD 1) spending the least per 2,000kcals (£3.89) and households living in the least deprived areas (SIMD 5) spending the most per 2,000kcals (£4.54).

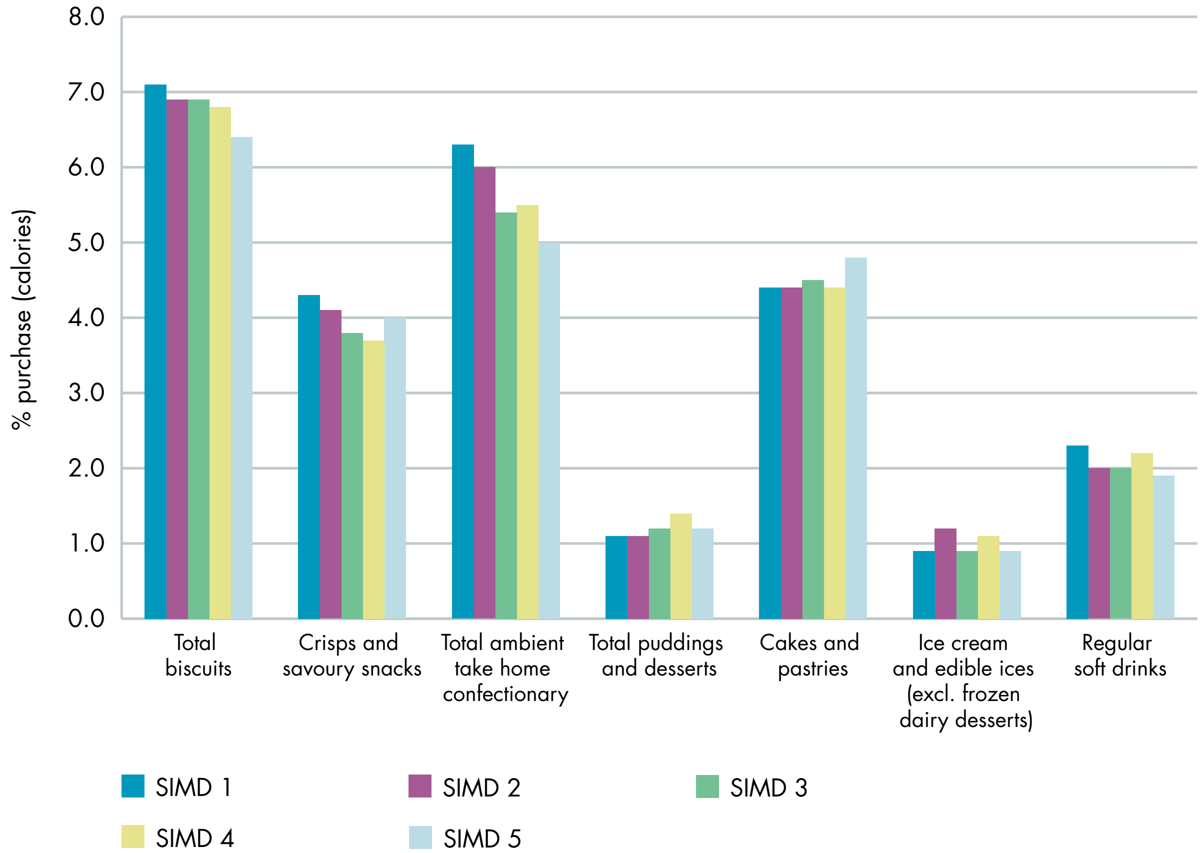
Figure 10:
Spend per 2,000kcal of total food and drink, by SIMD (2018)



23 This analysis was standardised using the recommended daily energy intake for an average adult female.

Figure 11 below illustrates the differences in purchase of discretionary categories by deprivation. Although the differences were small, in 2018 households living in the most deprived areas (SIMD 1) purchased a greater proportion of their calories from biscuits, crisps and savoury snacks, confectionery and regular soft drinks compared to the least deprived (SIMD 5). However, those living in the least deprived areas (SIMD 5) purchased a greater proportion of their calories from cakes and pastries compared to those living in the most deprived areas (SIMD 1).

Figure 11:
% of total take home calories from discretionary categories, by SIMD (2018)

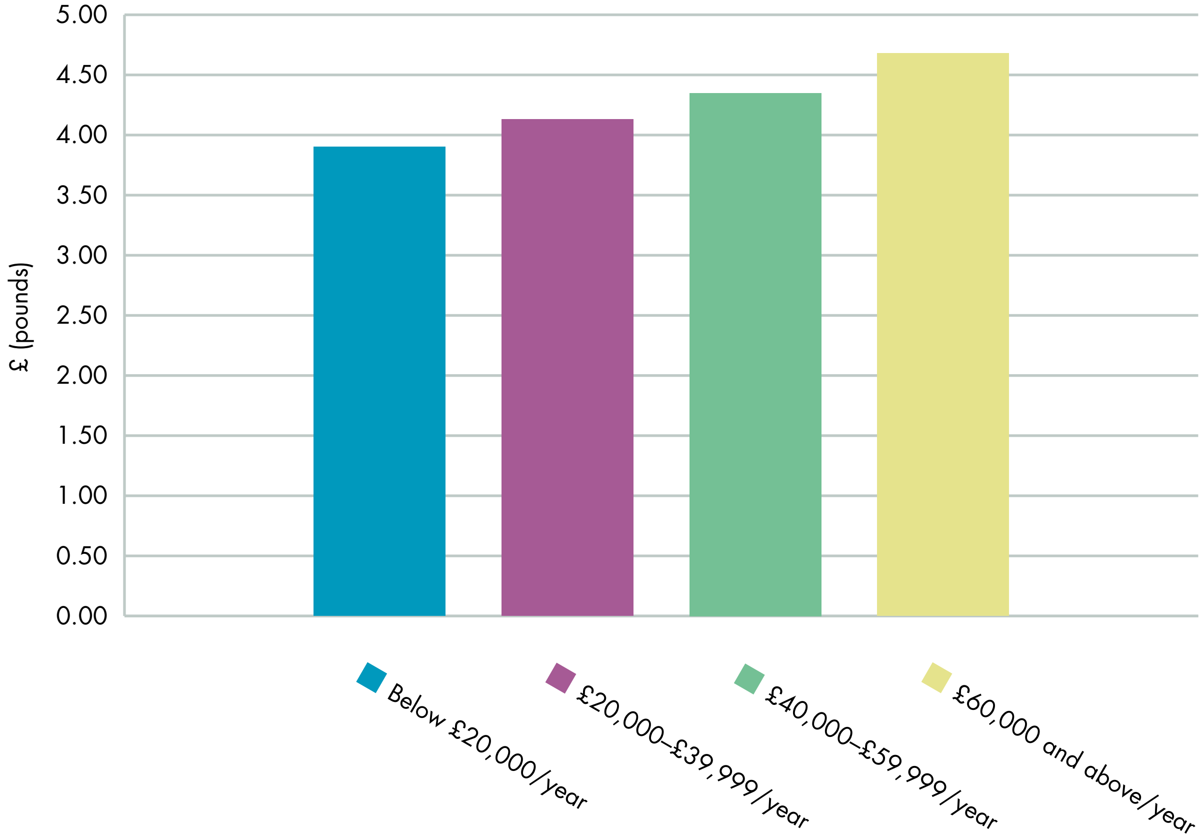


The proportion of calories purchased on price promotion from these discretionary categories, by SIMD, is discussed in section 12.5.

11.2 Household Income

Figure 12 below shows the difference in standardised spend (per 2,000kcal[24]) on food and drink by household income in 2018. Similar to the results on SIMD, spend per 2,000kcal of total food and drink increased with increasing household income. Households with an income of less than £20,000 a year spent the least per 2,000kcals (£3.90) and households with an income greater than £60,000 a year spent the most per 2,000kcals (£4.68).

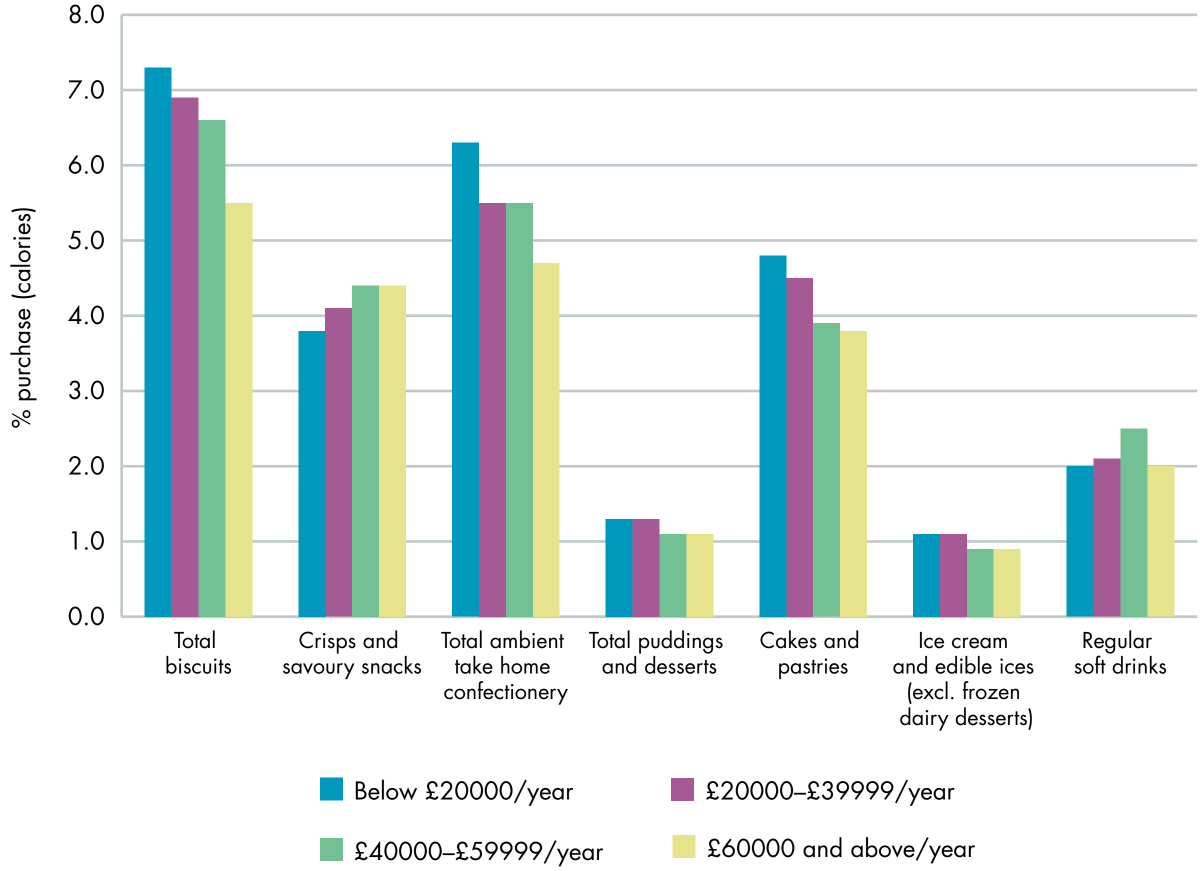
Figure 12:
Spend per 2,000kcal of total food and drink, by household income (2018)



24 This analysis was standardised using the recommended daily energy intake for an average adult female.

Figure 13 below illustrates the differences in purchase of discretionary categories by household income. Although the differences were small, in 2018 households with an income below £20,000 a year purchased a greater proportion of their calories from biscuits, confectionery, puddings and desserts, cakes and pastries and ice cream and edible ices compared to households with an income of more than £60,000 a year. However, households with an income of more than £60,000 a year purchased a greater proportion of their calories from crisps and savoury snacks compared to households with an income below £20,000 a year.

Figure 13:
% of total take home calories from discretionary categories, by household income (2018)



The proportion of calories purchased on price promotion from these discretionary categories, by household income, is discussed in section 12.6.

12. Retail price promotions in Scotland

Data presented within this section relates to **price** promotions only, and therefore does not include other marketing and promotional strategies such as product placement or advertising. Price promotions within the report refer to:

- TPR: a temporary reduction in the cost of a product, e.g. 10% off.
- Y for £X: an offer of buying a set number of products for a set price, e.g. two for £2.
- multi-buys: including BOGOF or three for two deals.
- price-marked packs: products which include price information as part of the package design.
- other price promotions: includes extra free, meal deal, free gift/sample deals.

12.1 Proportion of take home calories and nutrients purchased on price promotion

As shown in figure 14, price promotions accounted for 32% of the calories purchased into the home in 2018. Purchase of other nutrients on price promotion was similar, ranging from 28% for sodium to 36% for total fat and saturated fat.

Figure 14:
Proportion of take home nutritional volume and purchase of calories and nutrients on price promotion from total food and drink in Scotland (2018)

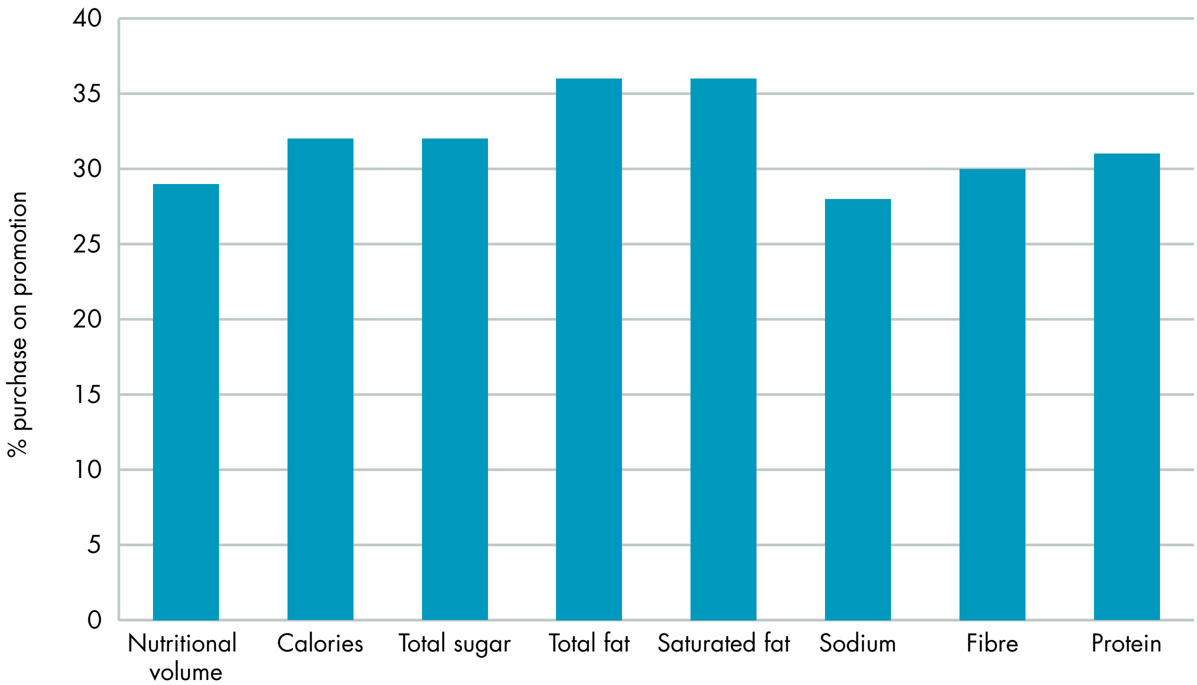
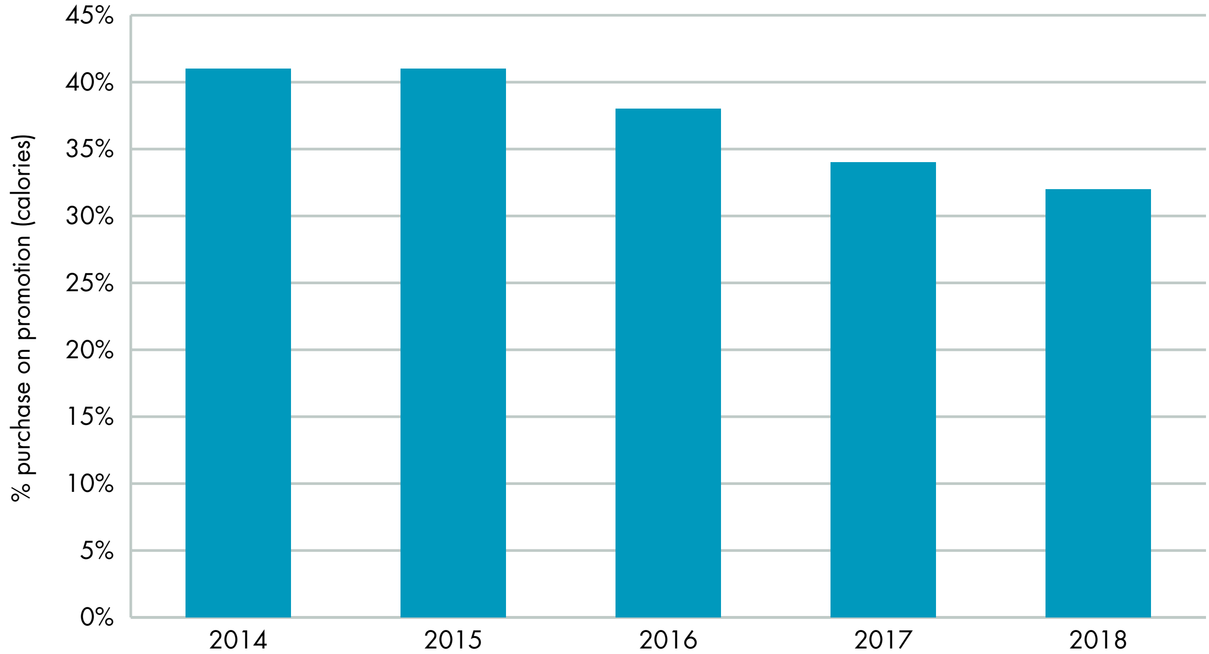


Figure 15 below shows that the proportion of calories purchased on price promotion has decreased since 2014, from 41% in 2014 and 2015 to 32% in 2018.

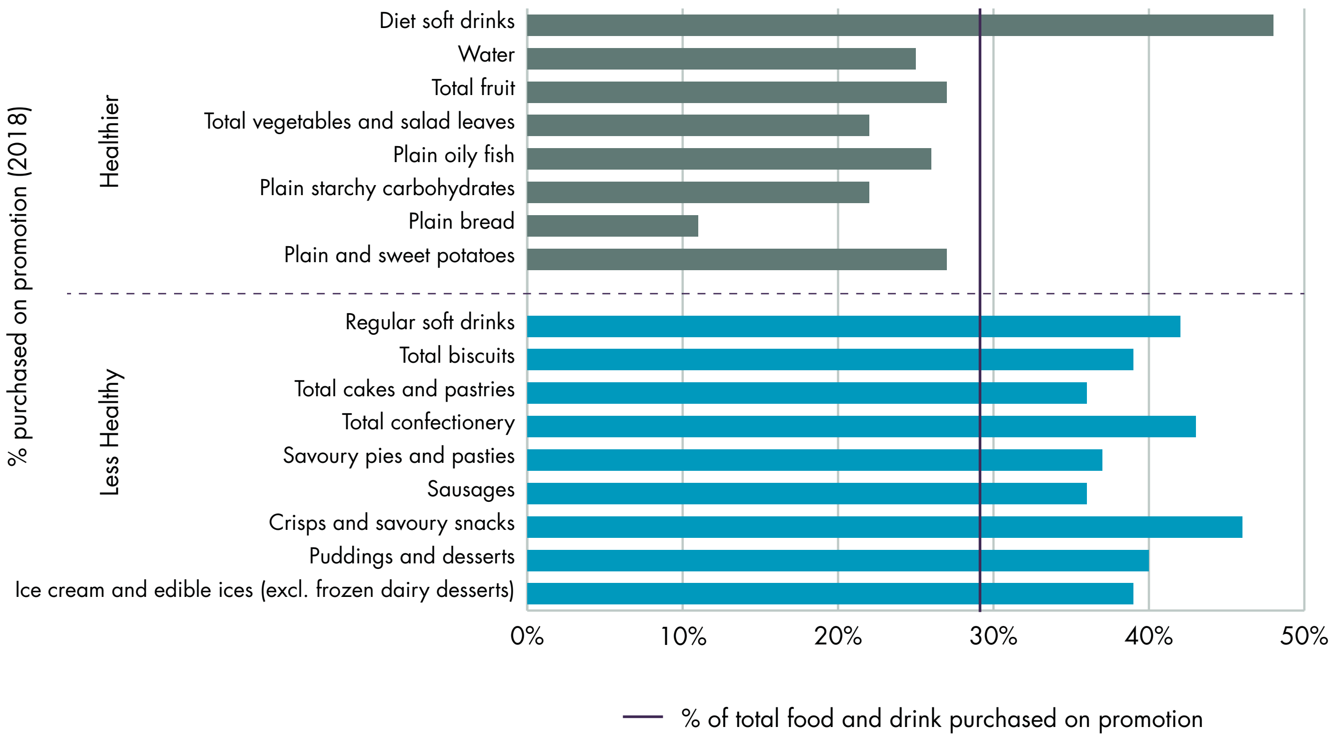
Figure 15:
Percentage calories purchased on price promotion in Scotland from total food and drink (2014-18)



12.2 Balance of price promotions: a comparison across a selection of healthier and less healthy product categories

Data previously published by FSS[25] showed that the balance of price promotions tended to be in favour of less healthy and discretionary categories. Figure 16 below shows that this has not changed, with purchase on price promotion of most less healthy categories exceeding the healthier categories. For example, 46% of crisps and savoury snacks were purchased on price promotion in 2018, compared with just 11% of bread. More positively, the purchase of soft drinks on price promotion has remained in favour of diet drinks.

Figure 16:
Percentage nutritional volume purchased on total price promotion in Scotland (2018): healthier vs less healthy

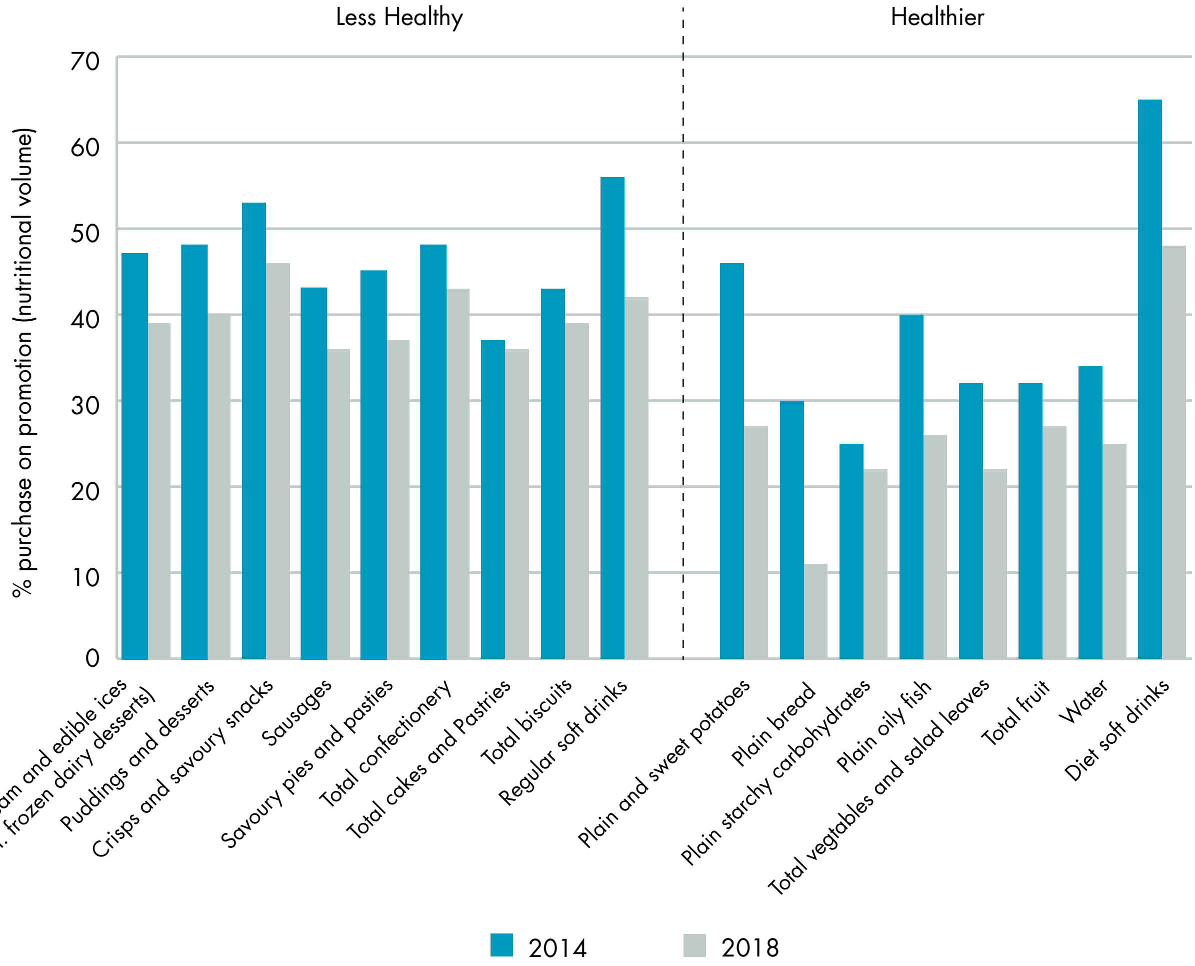


25 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

Figure 17 below shows the percentage purchase on price promotion for healthier versus less healthy categories in 2014, compared with 2018. The percentage of volume purchased on price promotion has decreased within all categories, both healthier and less healthy, since 2014. This aligns with the overall reduction in promotions we have seen since 2014, as illustrated in figure 15. However, there have been greater reductions in the purchase on price promotion for healthier categories than the less healthy categories.

Figure 17:

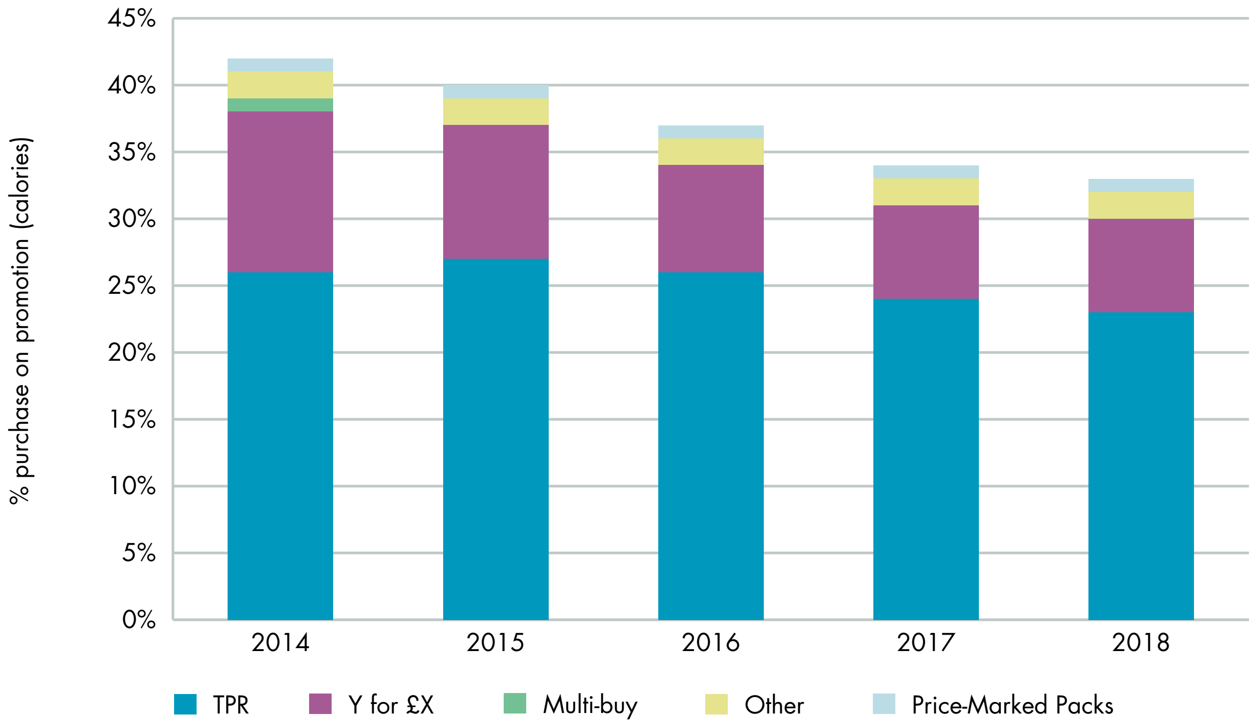
Percentage nutritional volume purchased on total price promotion in Scotland (2014 vs 2018); healthier vs less healthy



12.3 Balance of price promotions: a comparison by type of price promotion

Since 2014, TPR have remained the most common form of price promotion in Scotland and accounted for 23% of all calories purchased in 2018 (figure 18). Y for £X promotions have declined over this time, falling from 12% of calories purchased in 2014 to 7% in 2018. Similarly, multi-buys fell from 1% to nearly zero. Other[26] and PMP have remained consistent since 2014, accounting for 2% and 1% of calorie purchase respectively.

Figure 18:
Percentage of calories purchased on price promotion in Scotland from total food and drink, by promotion type (2014-18)



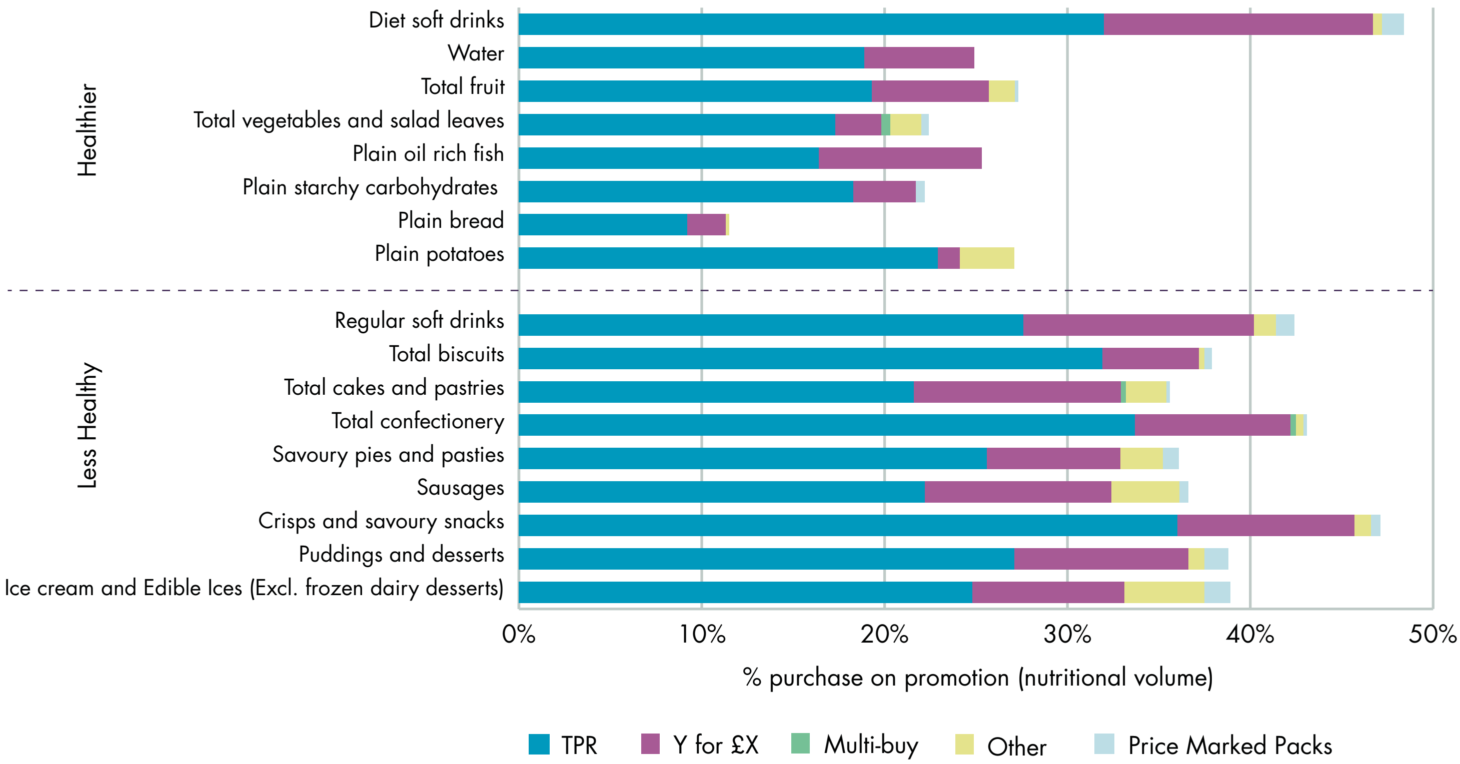
26 Other' price promotions include extra free deals, meal deals, free gift/sample deals.

Figure 19 below shows the spread of different price promotions across healthier and less healthy categories. Annexe 3 shows the changes in purchase of these categories on the different types of price promotion between 2014-18.

Most categories follow the same overall trend in terms of type of promotion described above for total food and drink: TPR is the most common, followed by Y for £X deals and only a small proportion (if any) coming from PMP and other price promotions. Multi-buys were virtually non-existent. Generally, less healthy foods appeared to be more commonly purchased using Y for £X deals than the healthier foods. For example, in 2018, 11.3% of cakes and pastries were purchased on a Y for £X deal compared to just 1.2% of plain potatoes. However, it is possible that, due to the perishability of many of these healthier categories, retailers and consumers avoid Y for £X and other 'bulk buy' style offers to minimise the potential for waste.

Figure 19:

Percentage nutritional volume purchased on price promotion in Scotland, by promotion type (2018); healthier vs less healthy



12.4 Contribution of discretionary foods purchased on promotion to purchase of calories, total fat, saturated fat, total sugar and sodium in Scotland (2018)

As illustrated in table 2 (section 8), discretionary foods contribute significantly to purchase of calories and nutrients. Combined, the purchase of these categories on promotion contributed around 10% to total purchase of calories, 11% to total purchase of total fat, 12% to total purchase of saturated fat, 17% to total purchase of total sugar, and 4% to total purchase of sodium (table 5).

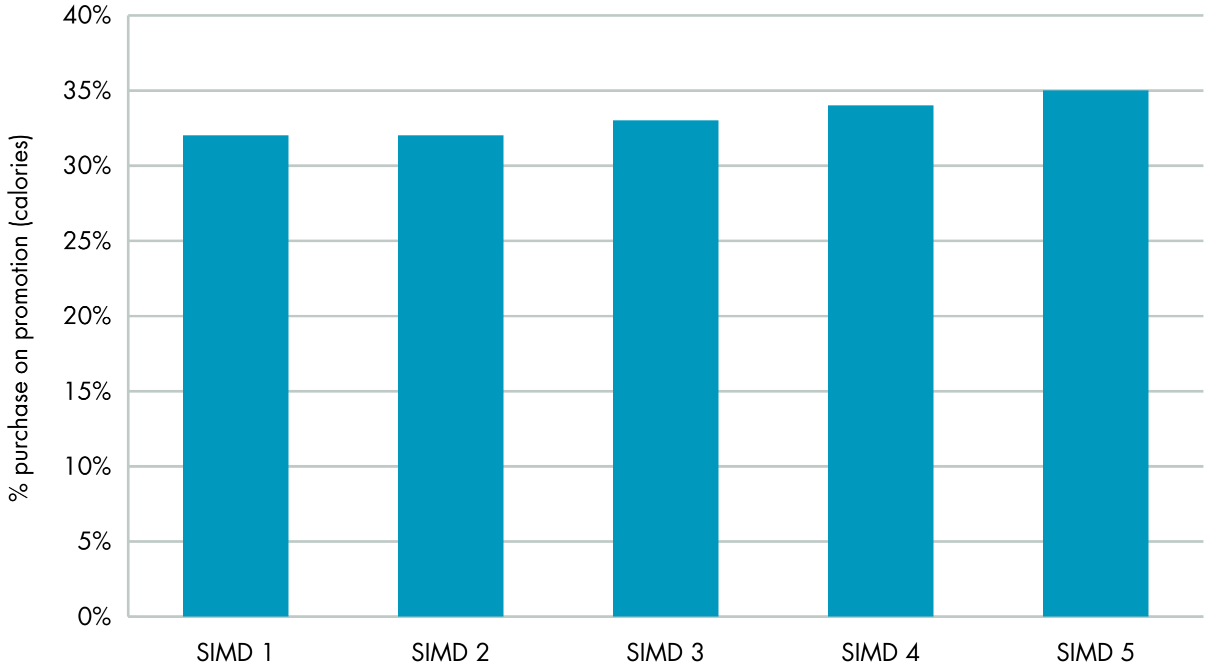
Table 5:
Contribution of discretionary food purchased on promotion to purchase of total calories, total fat, saturated fat, total sugar, and sodium in Scotland, (2018)

Category	% contribution on promotion in 2018 to purchase of:				
	Calories	Total Fat	Saturated Fat	Total Sugar	Sodium
Cakes and pastries	1.5%	1.5%	1.6%	2.3%	0.7%
Total biscuits	2.6%	2.8%	3.6%	3.1%	1.2%
Total ambient take home confectionery	2.5%	2.8%	4.3%	5.6%	0.4%
Crisps and savoury snacks	1.8%	2.5%	0.7%	0.2%	1.6%
Regular soft drinks	0.9%	0.1%	0.1%	3.6%	0.1%
Puddings and desserts	0.5%	0.5%	0.7%	0.9%	0.2%
Ice cream and edible ices (excl. frozen dairy desserts)	0.4%	0.5%	1.0%	0.8%	0.1%
TOTAL	10.3%	10.8%	12.0%	16.5%	4.4%

12.5 Purchase on price promotion by Scottish Index of Multiple Deprivation (SIMD)

The results suggested that there was little difference in purchase of calories purchased on price promotion according to SIMD, as shown in figure 20, despite figure 10 showing that there is a clear difference in overall spend on food and drink by SIMD.

Figure 20:
Percentage of total calories purchased into the home on price promotion by SIMD in Scotland (2018)

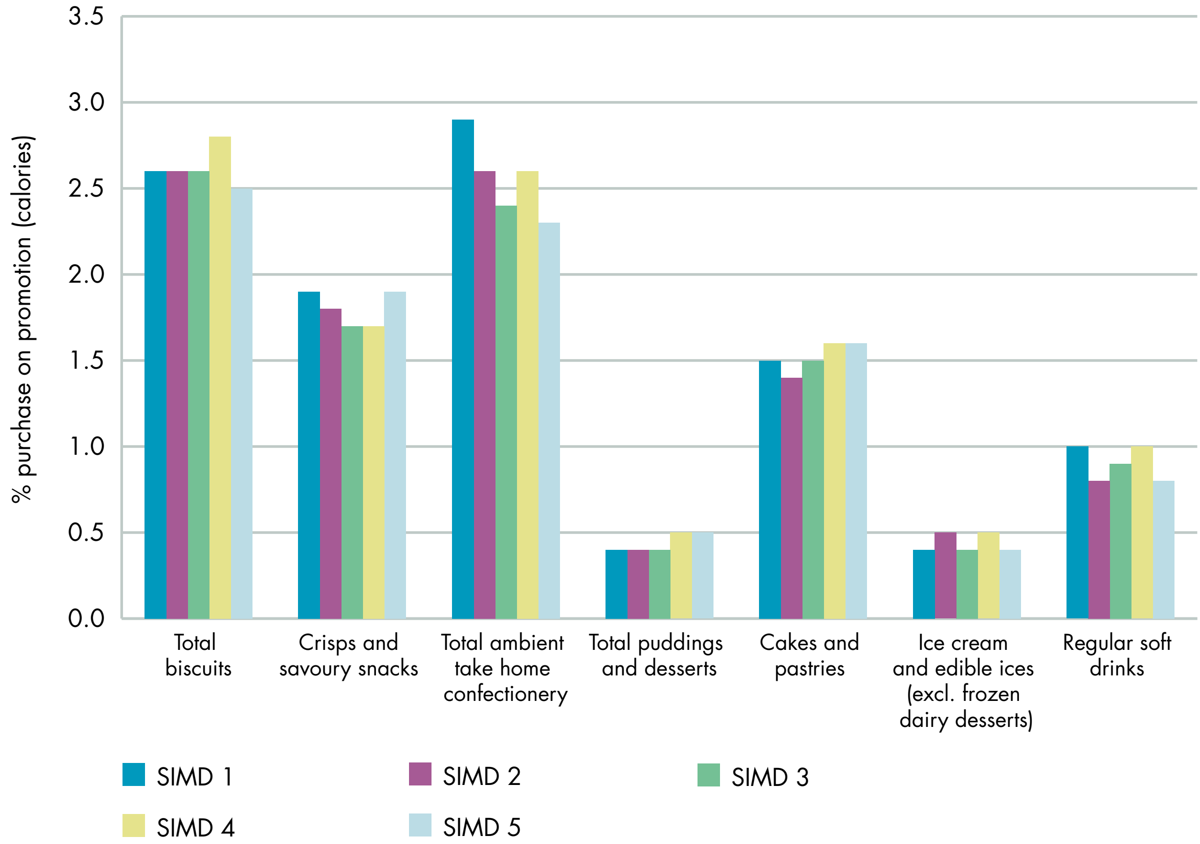


Similarly, the results also suggested that there was little difference in percentage of total spend on promotion by SIMD group. The split by promotion type was also similar amongst all SIMD groups (figure 21).

Figure 21:
Percentage spend on promotion by SIMD: Scotland take home food and drink (2018)

Figure 22 below illustrates the differences in purchase on promotion of discretionary categories by SIMD. Although the differences were small, in 2018 households living in the most deprived areas (SIMD 1) purchased a greater proportion of their calories on promotion from confectionery and regular soft drinks compared to the least deprived (SIMD 5). However, those living in the least deprived areas (SIMD 5) purchased a greater proportion of their calories on promotion from puddings and desserts and cakes and pastries compared to those living in the most deprived areas (SIMD 1).

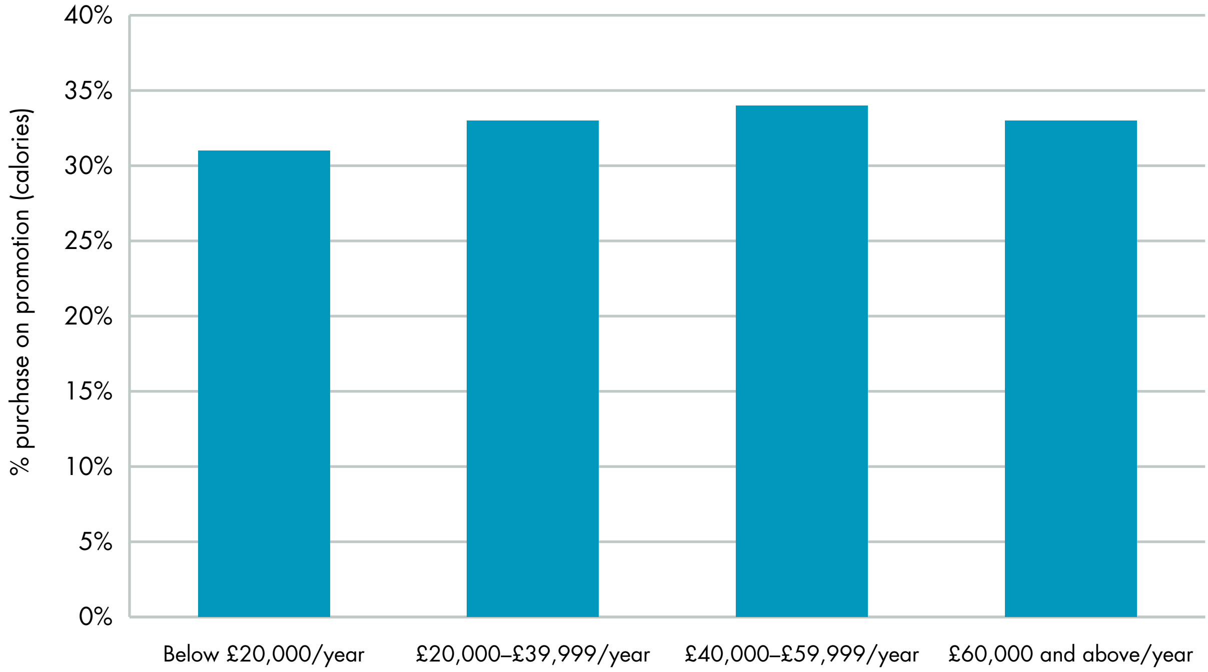
Figure 22:
Percentage of total take home calories from discretionary categories purchased on promotion, by SIMD (2018)



12.6 Purchase on price promotion by household income

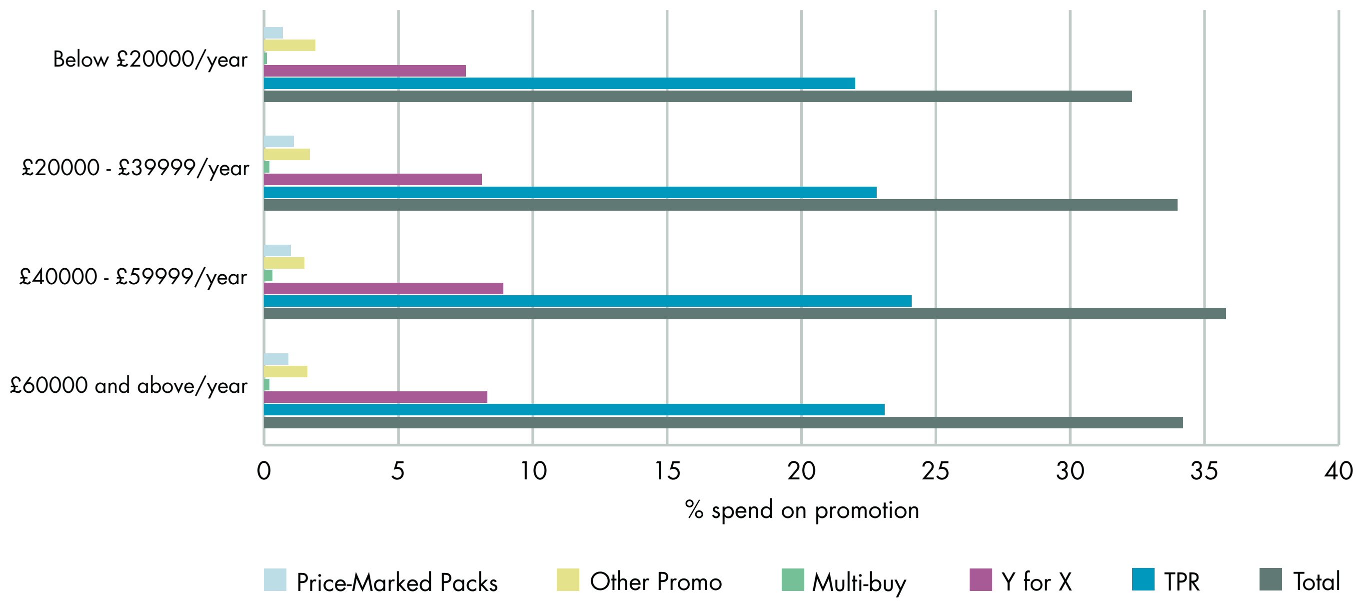
There was a small difference in the calories purchased on price promotion according to household income, as shown in figure 23, despite figure 12 showing that there is a clear difference in overall spend on food and drink by household income.

Figure 23:
Percentage of total take home calories purchased into the home on price promotion by household income in Scotland (2018)



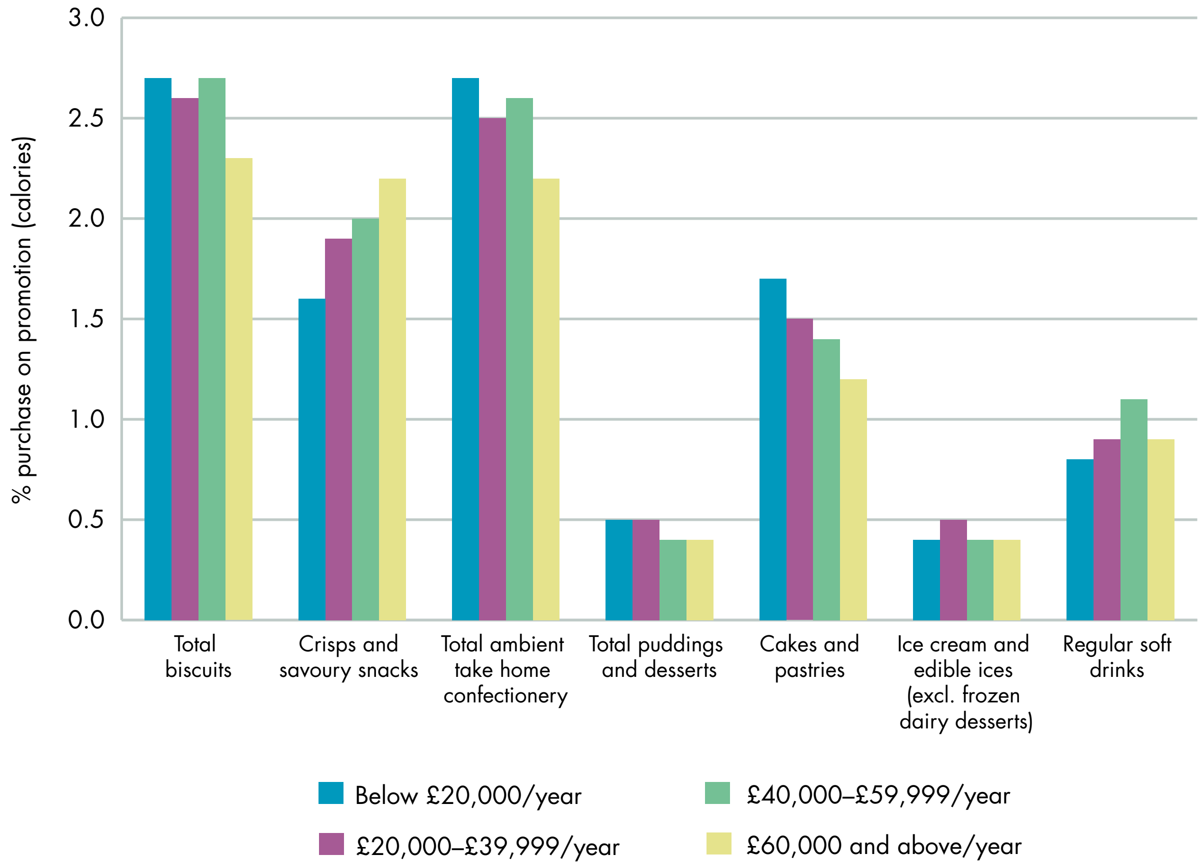
Households with an income of below £20,000 a year had the lowest percentage spend on promotion (32.3%), and households with an income of between £40,000 and £59,999 had the highest percentage spend on promotion (35.8%). The split by promotion type was similar amongst all household groups (figure 24).

Figure 24:
Percentage spend on promotion by household income level: Scotland take home food and drink (2018)



Furthermore, figure 25 below illustrates the differences in purchase on promotion of discretionary categories by household income. Although the differences were small, in 2018 households with an income below £20,000 a year purchased a greater proportion of their calories on promotion from biscuits, confectionery, puddings and desserts, and cakes and pastries compared to households with an income of more than £60,000 a year. However, households with an income of more than £60,000 a year purchased a greater proportion of their calories on promotion from crisps and savoury snacks compared to households with an income below £20,000 a year.

Figure 25:
Percentage of total take home calories from discretionary categories purchased on promotion, by income (2018)

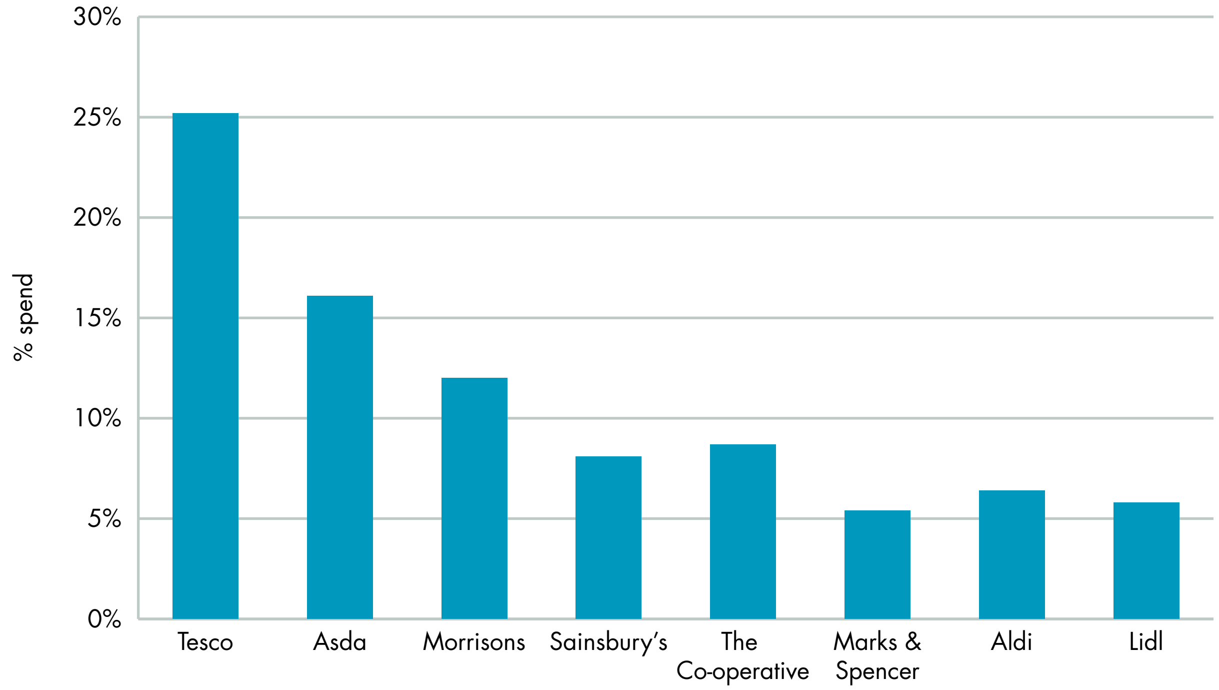


12.7 Purchase on price promotion by retailer

This section presents data on price promotions by retailer. Data has been included for the top 8 retailers; Tesco, Asda, Morrisons, the Co-operative, Sainsbury's, Aldi, Lidl and Marks & Spencer. Together these retailers contributed 88% of total take home spend and 87% of all calories purchased into the home in Scotland in 2018. Other retailers contributed around 13% of calories purchased into the home in Scotland.

The total take home spend in Scotland that these retailers contribute collectively can be further broken down into the individual retailers. Figure 26 illustrates that of all the retailers, Tesco had the greatest total take home spend into the home in Scotland with 25.2%, and Marks & Spencer had the least with 5.4%.

Figure 26:
Proportion of total take home spend into the home in Scotland, by retailer (2018)



Data on volume purchase by retailer was used as the standardised method to compare differences between retailers.

Figure 27 below shows the proportion of volume purchased on price promotion, by retailer. The data shows that, with the exception of Aldi and Lidl, purchase on price promotion was higher than the average of 29% (figure 14).

Figure 27:
Proportion of nutritional volume purchased on price promotion from total food and drink in Scotland, by retailer (2018)

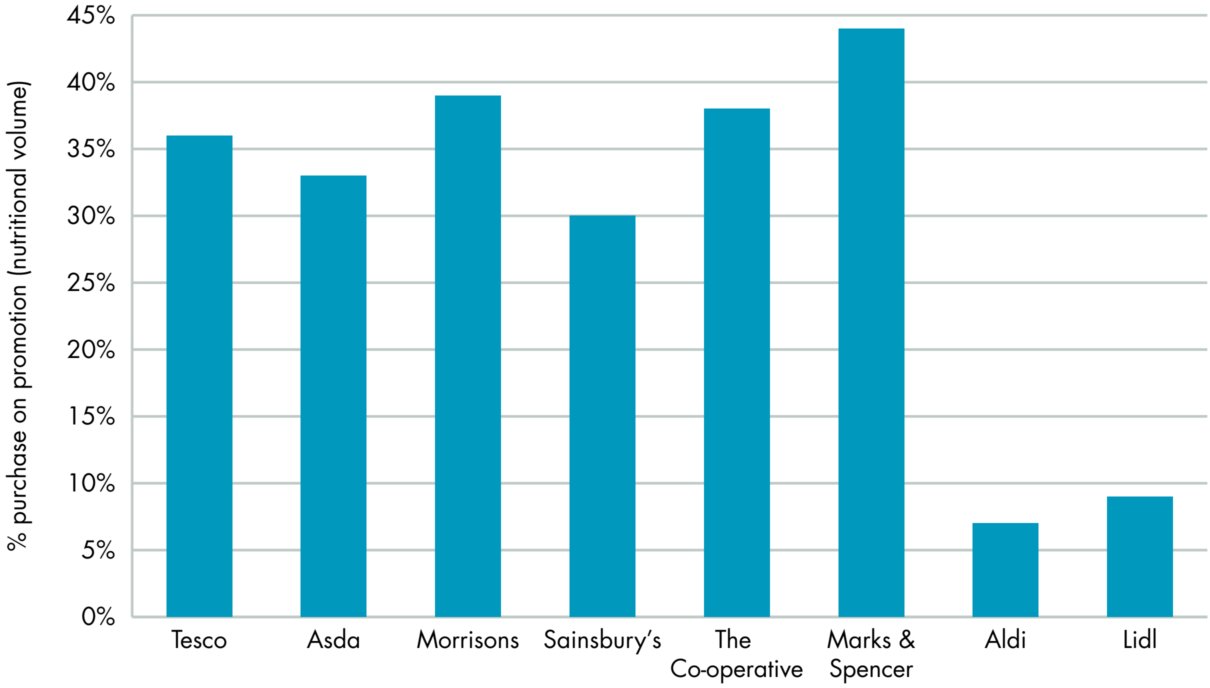
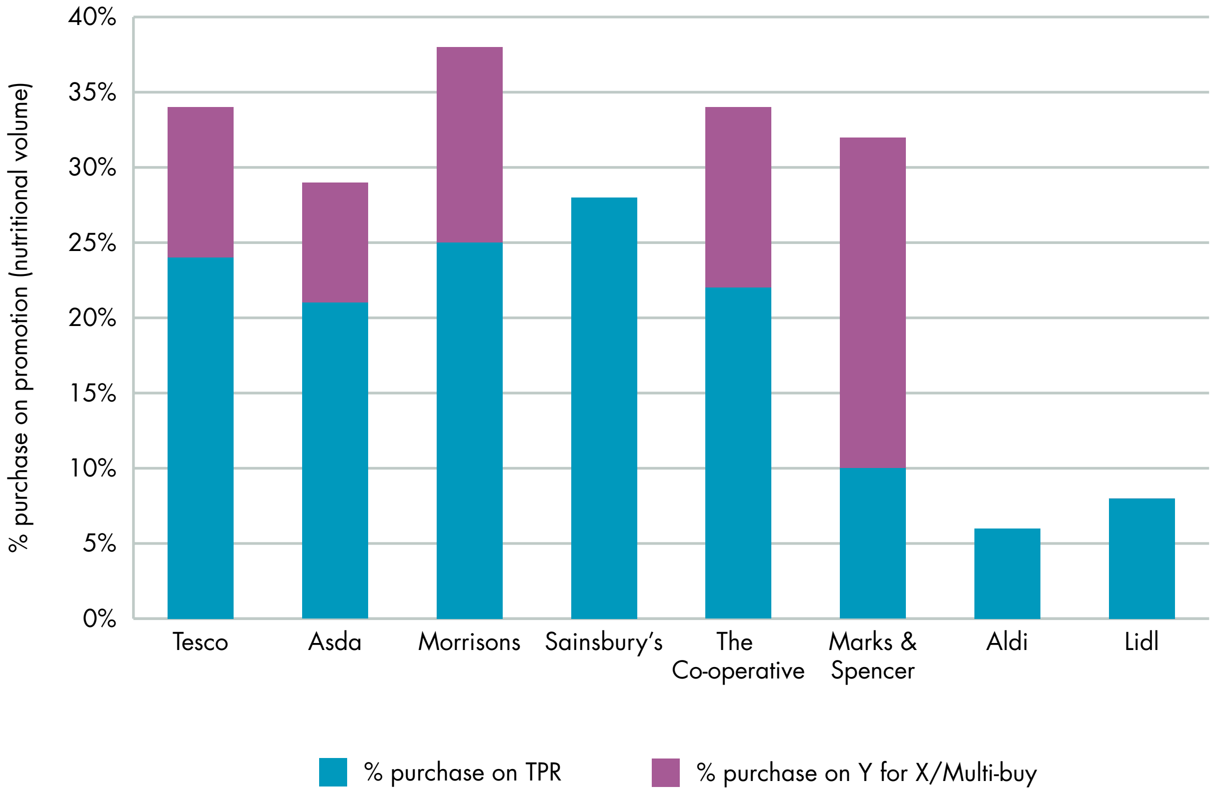


Figure 28 below shows the proportion of volume purchased through different types of price promotion, by retailer. Due to smaller sample sizes, data for Y for £X and multi-buy promotions have been combined. However, as purchase of multi-buys are very low overall, it can be assumed that the majority of purchase on Y for £X and multi-buys combined can be attributed to Y for £X deals.

All of the retailers, with the exception of Marks & Spencer, followed a similar pattern to the average (figure 18) whereby the majority of purchase on price promotion is through a TPR. However, whilst Tesco, Asda, Morrisons, the Co-operative and Marks & Spencer showed some level of total purchase through Y for £X and multi-buy deals, these types of promotions were non-existent within Sainsbury's, Aldi and Lidl.

Figure 28:

Proportion of nutritional volume purchased on price promotion from total food and drink in Scotland, by retailer and promotion type (2018)



The data showed variability in purchase of discretionary categories on price promotion by retailer. Overall, with the exception of Aldi and Lidl, purchase of discretionary categories on price promotion was high. Aldi and Lidl had much lower levels of discretionary products purchased on price promotion when compared with the other retailers (table 6), in line with their lower levels of promotion overall (figure 27).

Table 6:
Percentage nutritional volume purchased on total price promotion in Scotland: discretionary categories, by retailer (2018)

Category	Tesco	Asda	Morrisons	Sainsburys	Co-operative	Marks & Spencer	Aldi	Lidl
Total biscuits	55	42	69	49	54	56	4	9
Crisps and savoury snacks	60	51	65	65	66	54	1	16
Total ambient take home confectionery	74	49	70	61	67	46	6	9
Total puddings and desserts	46	49	58	42	45	48	3	8
Cakes and pastries	45	46	49	35	38	49	6	3
Ice cream and edible ices (excl. frozen dairy desserts)	49	35	47	43	43	*	*	*
Regular soft drinks	53	44	59	44	61	50	7	10

** No data due to small sample size*

12.8 Summary

In 2018, 32% of calories were purchased on price promotion, which is a decrease from 41% in 2014 and 2015.

TPR have remained the most common form of price promotion, accounting for 23% of all calories purchased in 2018. Since 2014, the overall balance of different types of price promotions has not changed.

Comparison of purchases on price promotion across a selection of healthier and less healthy categories showed that (with the exception of soft drinks, where the balance of promotion was in favour of diet drinks) in 2018, the less healthy foods tended to be more frequently purchased on promotion than the healthier foods. Overall purchase on price promotion has decreased amongst all categories since 2014. However there have been greater reductions for healthier categories.

These data showed that for the top 8 retailers, purchase on price promotion ranged from 7% to 44% in 2018. The level of purchase on promotion within individual categories also varied considerably by retailer. For example, purchase of confectionery on price promotion ranged from 74% in one of the retailers to only 6% in another.

13. Purchase of branded and private label products

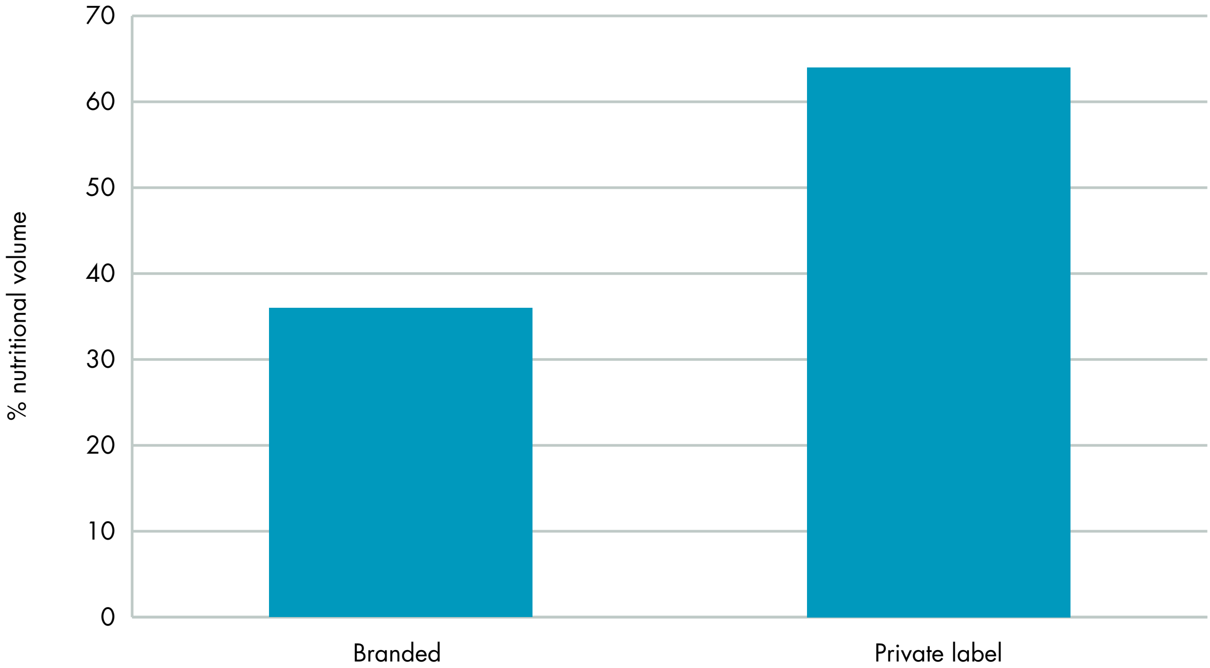
13.1 Proportion of branded and private label products

Previous data[27] had indicated that spend on promotion was greater (£2.00 per kilogram) than spend off promotion (£1.37 per kilogram), this has not changed in 2018. This suggests that, overall, on average it was more expensive to buy food and drink on price promotion than it was without a price promotion.

To further understand this, analysis was undertaken to explore differences in the purchase of branded and private label products into the home in Scotland in 2018. The term 'branded' product refers to products that have their own brand name, and the term private label refers to products that are sold under a retailer's branding.

Figure 29 illustrates the proportion of total food and drink purchased into the home in Scotland in 2018, by branded (36%) and private label (64%).

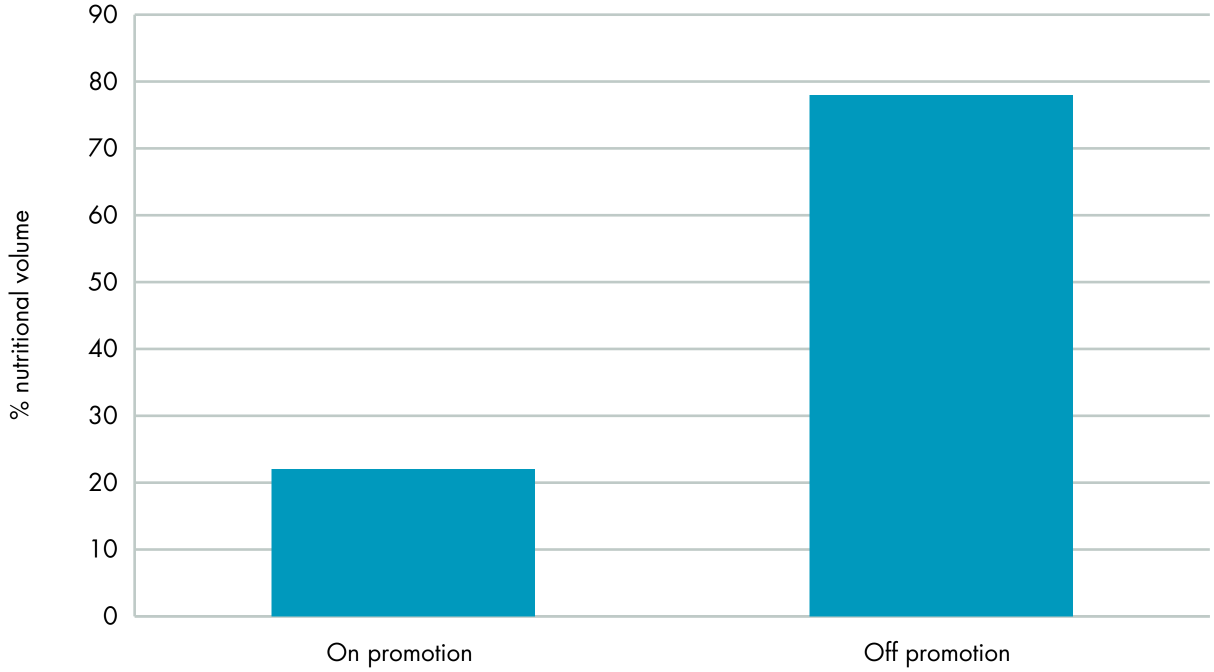
Figure 29:
Proportion of nutritional volume of total food and drink in Scotland, by branded and private label (2018)



27 FSS. Monitoring retail purchase and price promotions in Scotland, 2010-2016 (2018): https://www.foodstandards.gov.scot/downloads/Monitoring_retail_purchase_and_price_promotions_in_Scotland.pdf

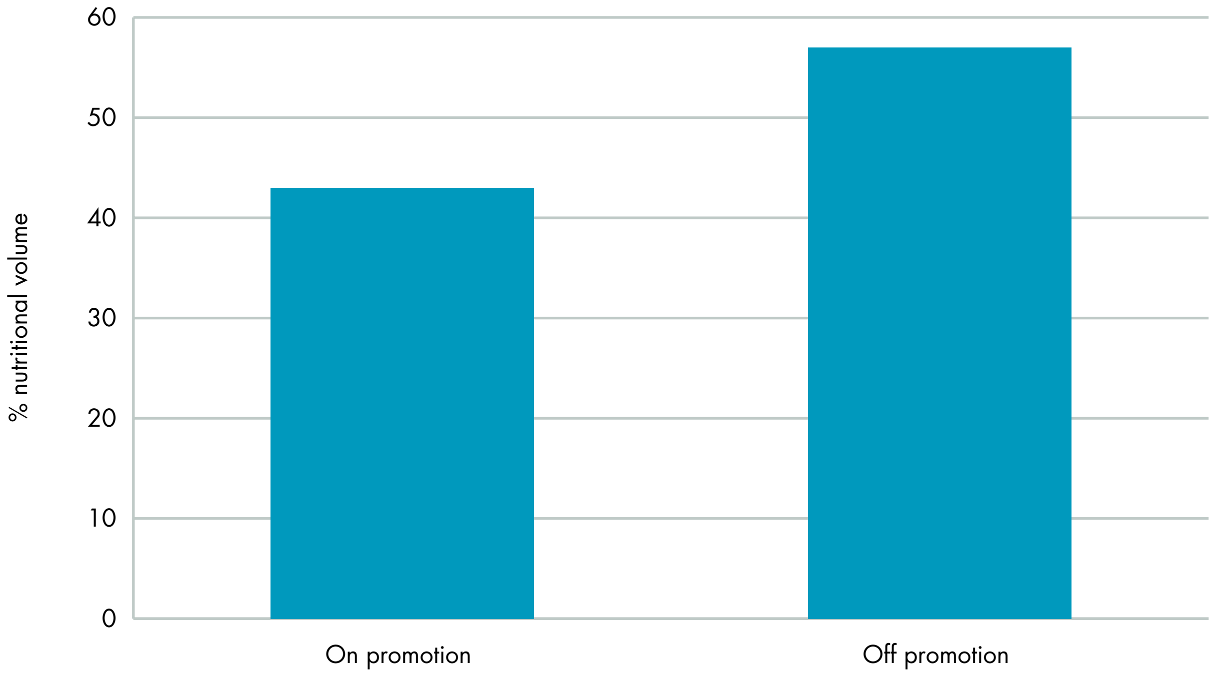
Of all the private label products purchased into the home in 2018, 22% of these were purchased on promotion and the remaining 78% were purchased off promotion (figure 30).

Figure 30:
Proportion of nutritional volume of total private label food and drink, purchased on and off promotion (2018)



Of all the branded products purchased into the home in 2018, 43% of these were purchased on promotion and the remaining 57% were purchased off promotion (figure 31).

Figure 31:
Proportion of nutritional volume of total branded food and drink, purchased on and off promotion (2018)



This could potentially account for the higher cost of overall food and drink purchased on promotion as described above.

13.2 Contribution of discretionary categories to total purchase of calories in 2018, by branded and private label

As previously illustrated in section 8 (table 2), discretionary categories were amongst the top contributors to take home purchase of calories in 2018.

In 2018, branded discretionary categories contributed 15.4% to total purchase of calories, whereas private label discretionary categories contributed 9.9%.

Table 7:
Contribution of discretionary categories to total purchase of calories in 2018, by branded and private label

Category	% contribution in 2018 to purchase of calories	
	Branded	Private label
Total confectionery	4.5%	1.1%
Total biscuits	4.4%	2.4%
Cakes and pastries	1.5%	3.0%
Crisps and savoury snacks	2.7%	1.3%
Regular soft drinks	1.3%	0.8%
Regular soft drinks subject to levy (>5g/100ml)	0.8%	0.6%
Regular soft drinks exempt from levy (<5g/100ml)	0.5%	0.2%
Total puddings and desserts	0.5%	0.7%
Ice cream and edible ices (excl. frozen dairy desserts)	0.5%	0.5%
Total	15.4%	9.9%

Note: due to rounding, values may differ slightly to values presented in previous figures

13.3 Comparison of calorie and nutrient content of branded and private label discretionary categories

Further analysis was carried out to explore any differences in the average calorie, total fat, saturated fat, total sugar and sodium content of branded and private label discretionary categories.

Overall, there was no consistent pattern between branded and private label discretionary categories. The average calorie and nutrient content varied across the discretionary food categories and any differences were small (full results are provided in table 8, and annexe 4).

13.3.1 Calories

On average, branded confectionery, ice cream and edible ices had a higher calorie content per 100g when compared with private label products. However, branded biscuits, cakes and pastries, crisps and savoury snacks, total regular soft drinks, and puddings and desserts had a lower average calorie content per 100g when compared to private label products. Generally there was little difference in the average calorie content of branded and private label regular soft drinks subject to and exempt from the levy.

13.3.2 Total sugar

On average, branded biscuits, ice cream and edible ices had a higher sugar content per 100g when compared with private label products. However, branded cakes and pastries, crisps and savoury snacks, total regular soft drinks and puddings and desserts had a lower average sugar content per 100g when compared to private label products. Generally there was little difference in the average sugar content of branded and private label confectionery and regular soft drinks subject to and exempt from the levy.

13.3.3 Total fat

On average, branded confectionery, and ice cream and edible ices had a higher total fat content per 100g when compared with private label products. However, branded cakes and pastries, crisps and savoury snacks, and puddings and desserts had a lower total fat content per 100g when compared to private label products. Generally there was little difference in the average total fat content of branded and private label biscuits, total regular soft drinks and regular soft drinks subject to and exempt from the levy.

13.3.4 Saturated Fat

On average, branded confectionery, and ice cream and edible ices had a higher saturated fat content per 100g when compared with private label products. However, branded biscuits, cakes and pastries, crisps and savoury snacks, and puddings and desserts had a lower saturated fat content per 100g when compared to private label products. Generally there was little difference in the average saturated fat content of branded and private label total regular soft drinks and regular soft drinks subject to and exempt from the levy.

13.3.5 Sodium

Generally there was little or no difference in the average sodium content of branded and private label discretionary categories.

Table 8:
Average calorie, total fat, saturated fat, total sugar and sodium content of branded and private label discretionary categories (2018)

Category	Kcal/100g		Total Fat (g/100g)		Saturated Fat (g/100g)		Total Sugar (g/100g)		Sodium (g/100g)	
	Branded	Private label	Branded	Private label	Branded	Private label	Branded	Private label	Branded	Private label
Confectionery	463.7	445.7	19.6	16.4	11.4	9.4	56.4	55.8	0.1	0.1
Biscuits	468.8	472.0	20.1	19.9	9.7	10.1	28.8	26.0	0.3	0.3
Cakes and pastries	152.0	186.8	5.7	7.5	5.7	7.5	11.5	13.4	0.1	0.1
Crisps and savoury snacks	509.4	525.3	28.7	31.3	28.7	31.3	4.0	4.5	0.6	0.5
Regular soft drinks	34.5	37.9	0.1	0.1	0.1	0.0	7.5	8.1	0.0	0.0
Regular soft drinks subject to the levy (>5g/100ml)	45.6	46.0	0.2	0.1	0.1	0.1	10.1	9.8	0.0	0.0
Regular soft drinks exempt from the levy (<5g/100ml)	24.5	22.4	0.0	0.0	0.0	0.0	5.1	4.8	0.0	0.0
Puddings and desserts	153.0	195.6	5.2	8.2	3.2	3.9	16.6	17.9	0.1	0.1
Ice cream and edible ices	192.3	168.3	9.8	7.5	6.4	5.5	19.1	17.4	0.1	0.1

14. Overview of pack sizes and pack types for confectionery and savoury snacks

This section presents new data relating to the average pack sizes of crisps and savoury snacks, and confectionery in addition to analyses by different pack types or formats.

Data has been grouped in to the following pack types:

Crisps and savoury snacks

- Standard packs, weighing up to 39g
- Maxi packs, weighing between 40 and 80g
- Family packs, weighing over 81g
- Multipacks, containing a number of individually wrapped packets.

Confectionery

- Singles products, marketed as a single serving and typically weighing up to 100g
- Sharing packs, generally weighing over 100g
- Multipacks, containing a number of individually wrapped packets
- Other, including boxed confectionery, Easter eggs, seasonal and novelty products

Subcategories of confectionery and crisps and savoury snacks which were not easily identifiable according to pack type were removed for the purposes of analysis around packs sizes and types. The key exclusions for this analysis were gum (confectionery), and nuts and popcorn (crisps and savoury snacks).

Therefore, the results presented in this section are based on different definitions of confectionery and crisps and savoury snacks compared to the rest of this report.

To provide context, the change in volumes using these category definitions is provided below:

The overall volume of crisps and savoury snacks purchased between 2014 and 2018 increased by 12%.

The overall volume of confectionery purchased between 2014 and 2018 increased by 8%.

14.1 Crisps and savoury snacks

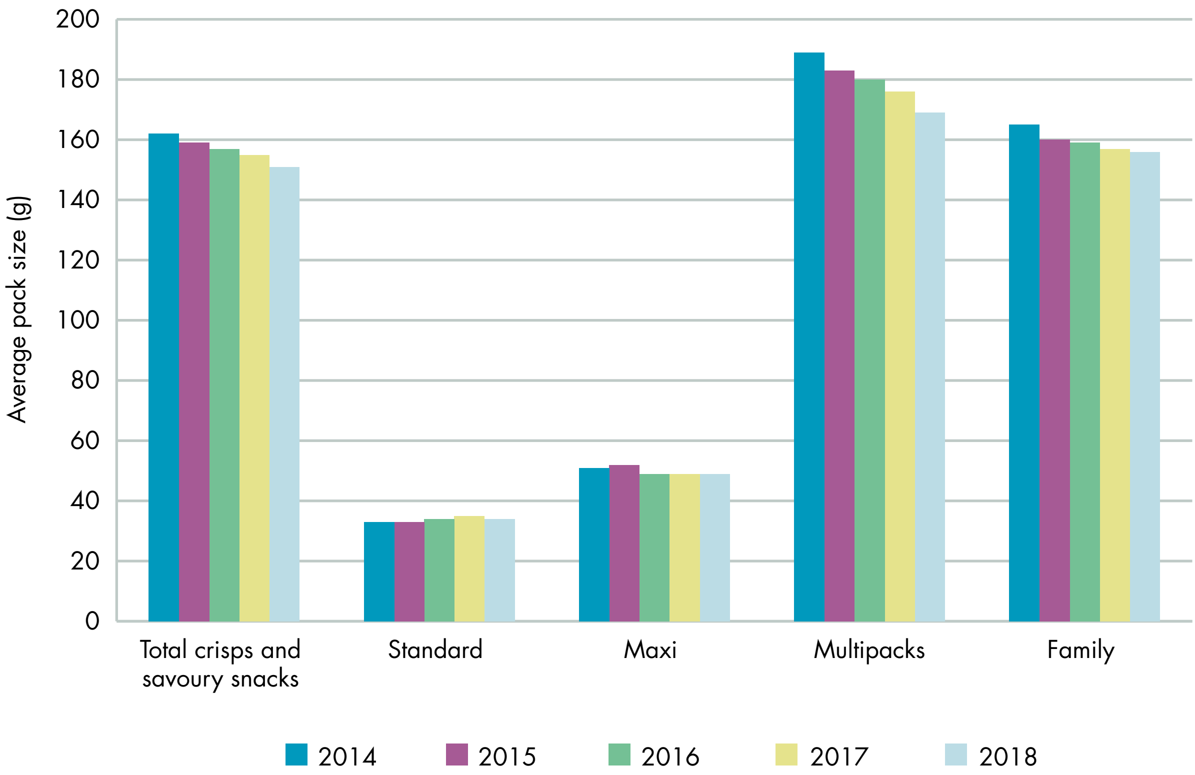
14.1.1 Change in average pack sizes of crisps and savoury snacks

Figure 32 below shows the average pack size of crisps and savoury snacks for each pack type between 2014 and 2018.

The average pack size for crisps and savoury snacks overall was 151g in 2018. Multipacks had the highest average pack size (169g) whereas standard packs had the smallest average pack size (34g) in 2018.

The average pack size of most pack types decreased between 2014-18, most notably within multipacks where there was a 10% decrease. Standard packs were the only pack type where the average pack size increased (4%) over this time period.

Figure 32:
Average pack size of crisps and savoury snacks, by pack type (2014-18)



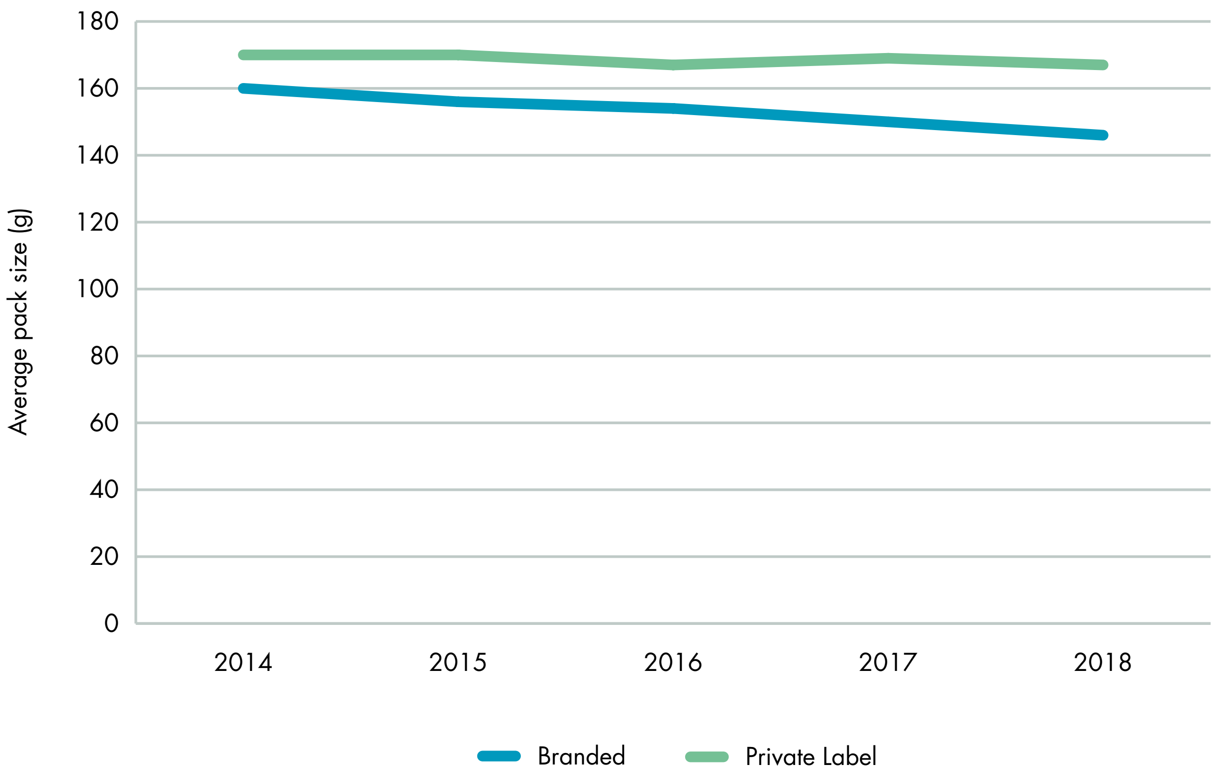
14.1.2 Average pack size of branded and private label crisps and savoury snacks

Figure 33 shows the trends in the average pack size of branded and private label crisps and savoury snacks between 2014-18.

The average pack size of private label crisps and savoury snacks was consistently larger than branded between 2014 and 2018.

The average pack size of private label crisps and savoury snacks changed very little between 2014 (170g) and 2018 (167g), whereas the average pack size of branded decreased from 160g in 2014 to 146g in 2018.

Figure 33:
Average pack size of branded and private label crisps and savoury snacks (2014-18)



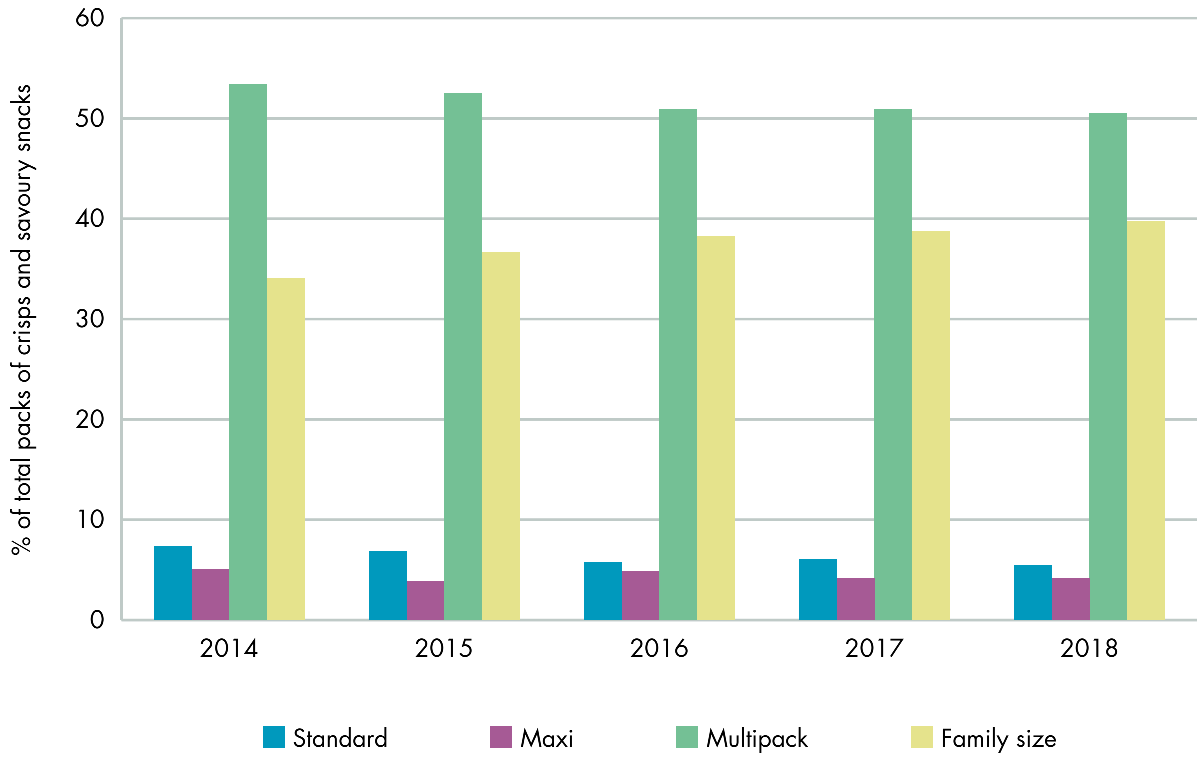
14.1.3 Purchase of crisps and savoury snacks by pack type

Figure 34 illustrates the purchase of different pack types of crisps and savoury snacks, as a proportion of total packs.

In 2018, multipacks were the most common pack type representing around 50% of all the packs purchased, whereas maxi packs were the least purchased pack type (4%).

The share of standard, maxi and multipacks of crisps and savoury snacks purchased has decreased since 2014, whereas the share of family packs has increased.

Figure 34:
Purchase of crisps and savoury snacks by pack type, as a proportion of total packs purchased (2014-18)



There were only small differences in the purchase of different pack types of crisps and savoury snacks, as a proportion of total packs by Scottish Index of Multiple Deprivation (SIMD) and household income.

Similar to the figures for total Scotland above, multipacks held the largest share of crisps and savoury snacks within all SIMD groups and income brackets.

Purchase of standard packs was highest within the most deprived areas (SIMD 1) and lowest income group.

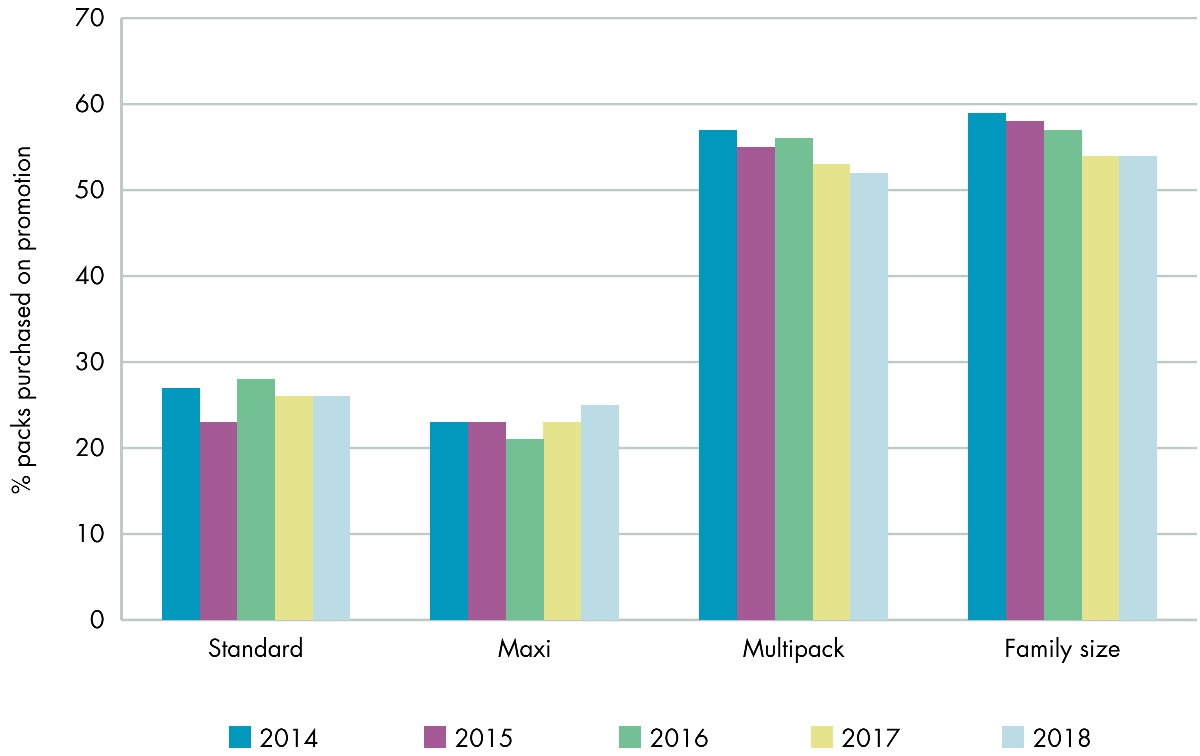
14.1.4 Purchase of different pack types of crisps and savoury snacks on promotion

Figure 35 below shows the proportion of different pack types of crisps and savoury snacks purchased on promotion between 2014 and 2018.

The data shows that, in 2018, multipacks and family packs were more frequently purchased on price promotion compared to standard and maxi packs (over 50% compared with around 25%).

Purchase of multipacks and family packs on price promotion has slightly decreased since 2014, whereas there has been little change in the purchase of standard and maxi packs of crisps and savoury snacks on promotion.

Figure 35:
Purchase of different pack types of crisps and savoury snacks on promotion (2014-18)



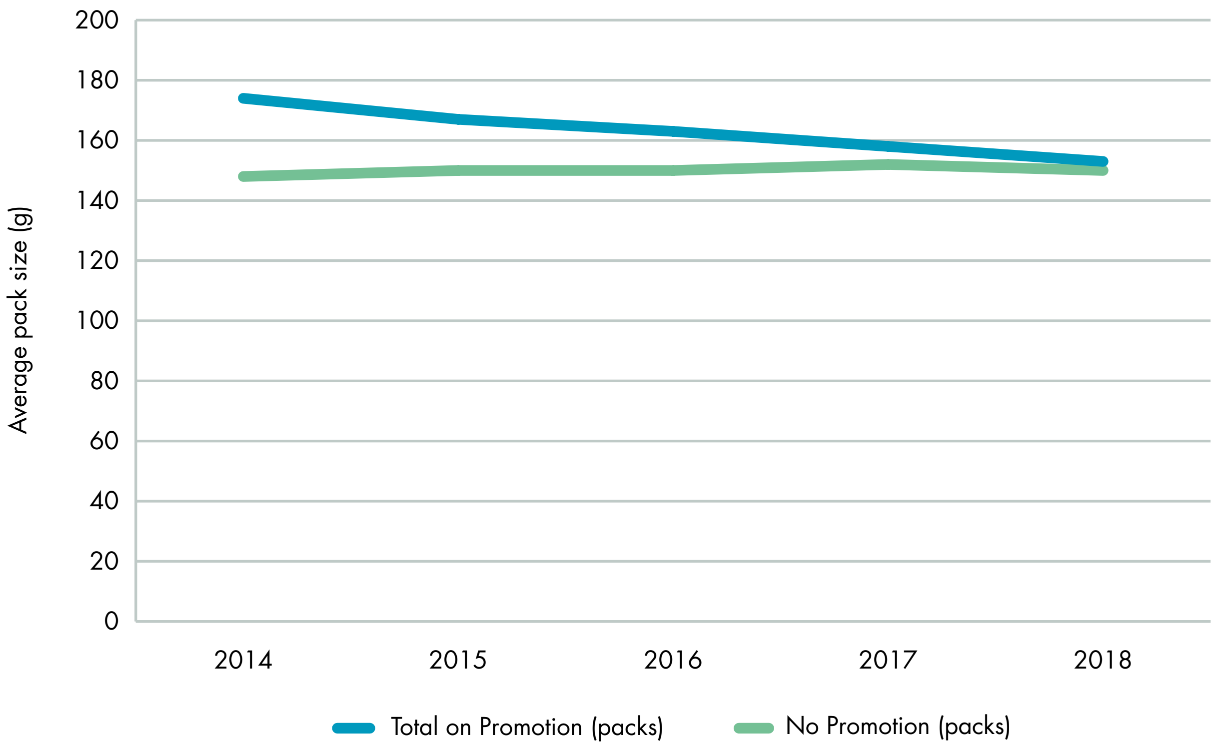
14.1.5 Average pack size of crisps and savoury snacks on and off price promotion

Figure 36 below shows the trends in the average pack size of crisps and savoury snacks purchased on price promotion, compared to those purchased without a price promotion.

In 2018, there was little difference between the average pack size of crisps and savoury snacks purchased on promotion (153g) and those off promotion (150g).

This is a change from 2014 when the average pack size of crisps and savoury snacks purchased on promotion was larger (174g) than those purchased off promotion (148g).

Figure 36:
Average pack size of crisps and savoury snacks purchased on price promotion vs no promotion (2014-18)



14.2 Confectionery

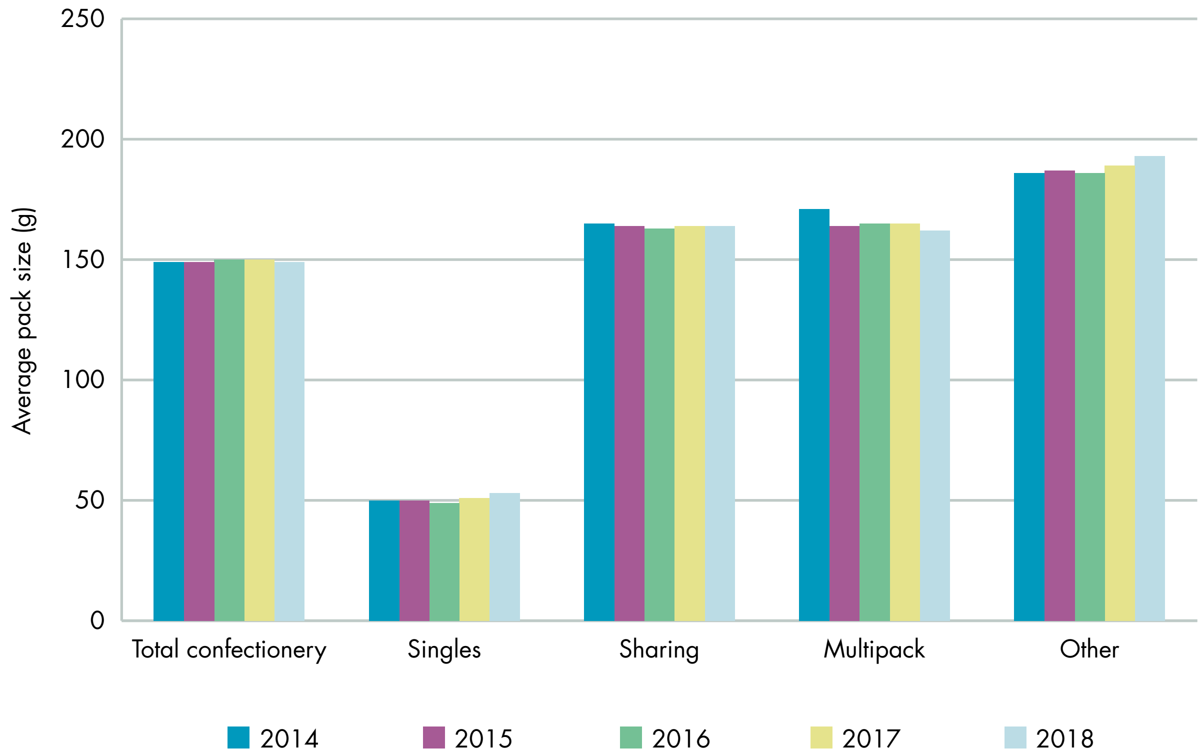
14.2.1 Change in average pack sizes of confectionery

Figure 37 below shows the average pack size of confectionery for each pack type between 2014 and 2018.

The average pack size for confectionery overall was 149g in 2018. 'Other' had the highest average pack size (193g), whereas single packs had the smallest average pack size (53g) in 2018.

There was little change in the average pack size of most pack types of confectionery between 2014 and 2018.

Figure 37:
Average pack size of confectionery, by pack type (2014-18)

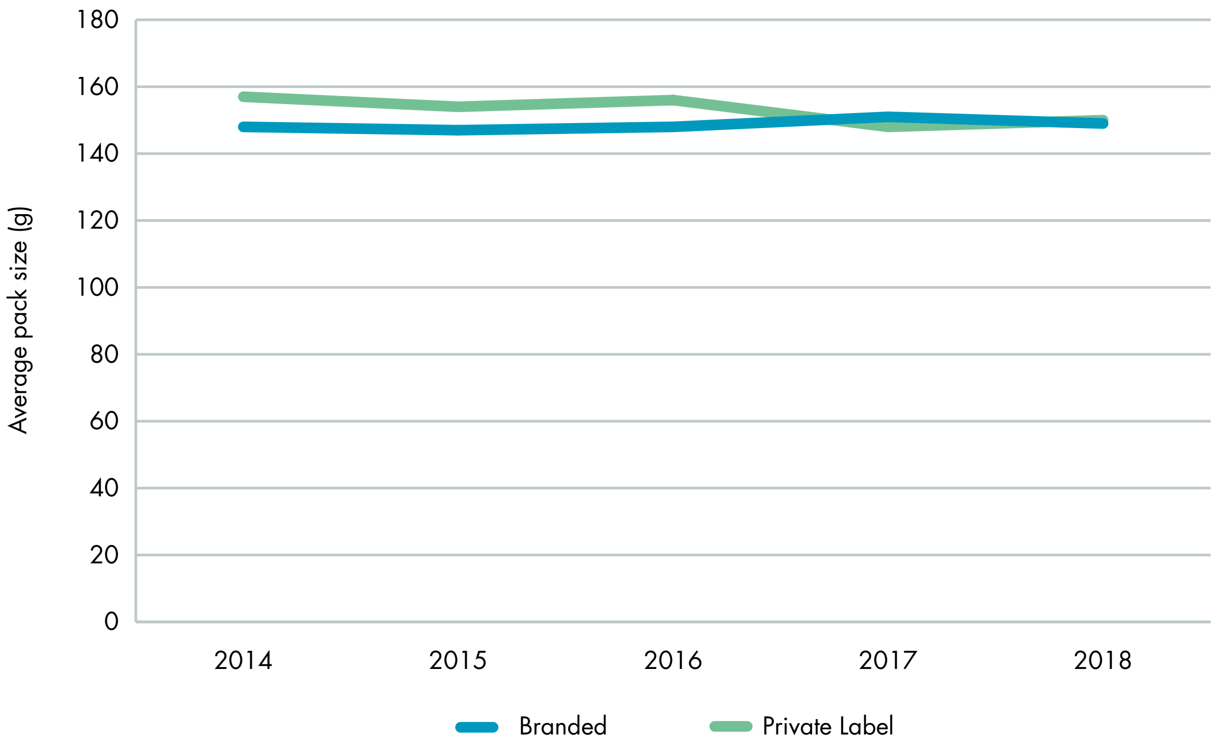


14.2.2 Average pack size of branded and private label confectionery

Figure 38 shows the trends in the average pack size of branded and private label confectionery between 2014-18.

The average pack size of branded confectionery changed very little between 2014 (148g) and 2018 (149g), whereas the average pack size of private label confectionery decreased from 157g in 2014 to 150g in 2018.

Figure 38:
Average pack size of branded and private label confectionery (2014-18)



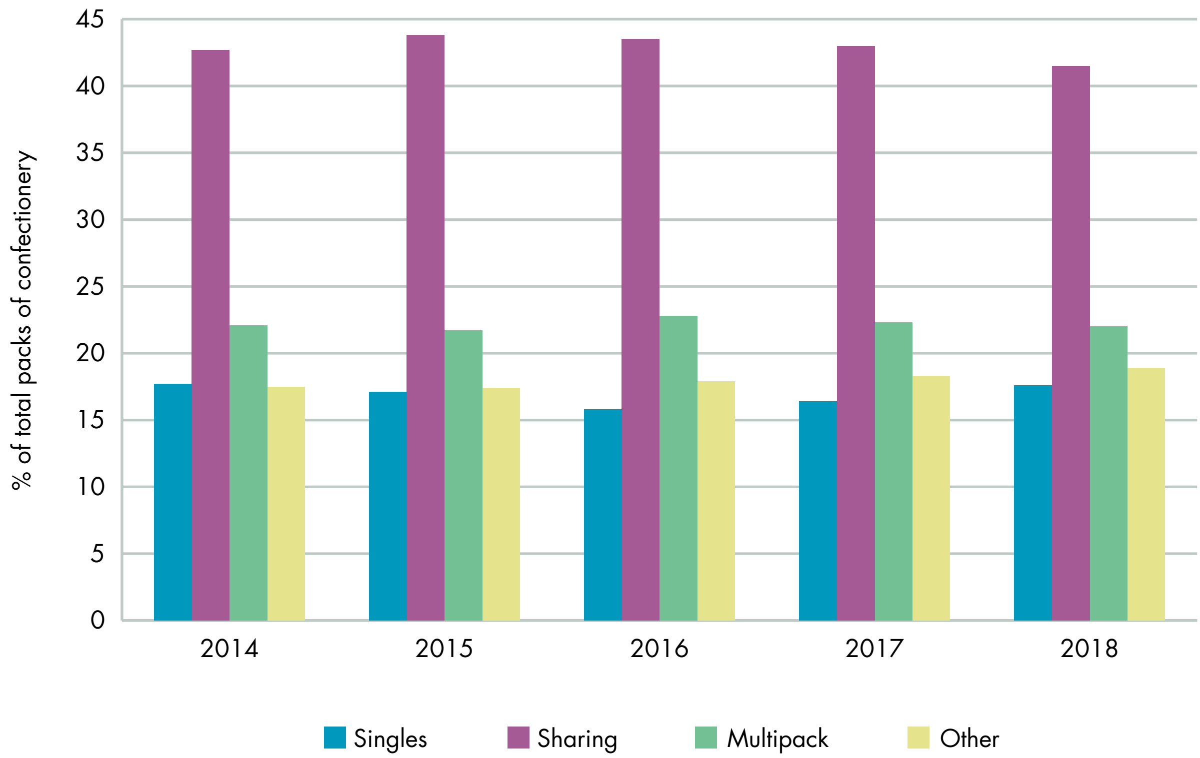
14.2.3 Purchase of confectionery by pack type

Figure 39 illustrates the purchase of different pack types of confectionery, as a proportion of total packs.

In 2018, sharing packs were the most common pack type, representing 42% of all packs purchased, whereas single packs were the least purchased pack type (18%).

Overall, the share of all pack types of confectionery has changed very little since 2014.

Figure 39:
Purchase of confectionery by pack type, as a proportion of total packs purchased (2014-18)



There were only small differences in the purchase of different pack types of confectionery, as a proportion of total packs by Scottish Index of Multiple Deprivation (SIMD) and household income.

Similar to the figures for total Scotland above, sharing packs held the largest share of confectionery within all SIMD groups and income brackets.

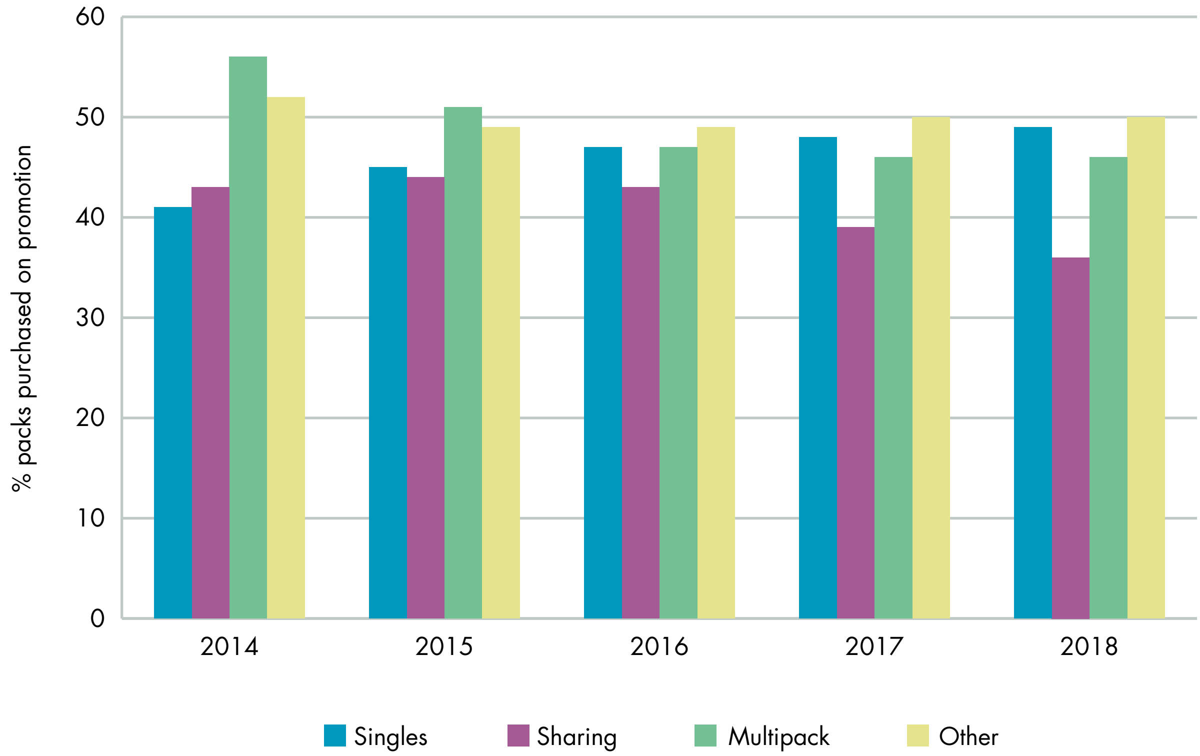
14.2.4 Purchase of different pack types of confectionery on promotion

Figure 40 below shows the proportion of different pack types of confectionery purchased on promotion between 2014 and 2018.

The data shows that, in 2018, 'other' packs of confectionery were the most frequently purchased on promotion (50%), whereas sharing packs were least frequently purchased on promotion in 2018 (36%).

Purchase of multipacks and sharing packs on promotion has decreased since 2014, 56% vs 46% of multipacks and 43% vs 36% of sharing packs. In contrast, purchase of single packs on promotion has increased from 41% in 2014 to 49% in 2018. Purchase of 'other' packs has changed very little since 2014.

Figure 40:
Purchase of different pack types of confectionery on promotion (2014-18)



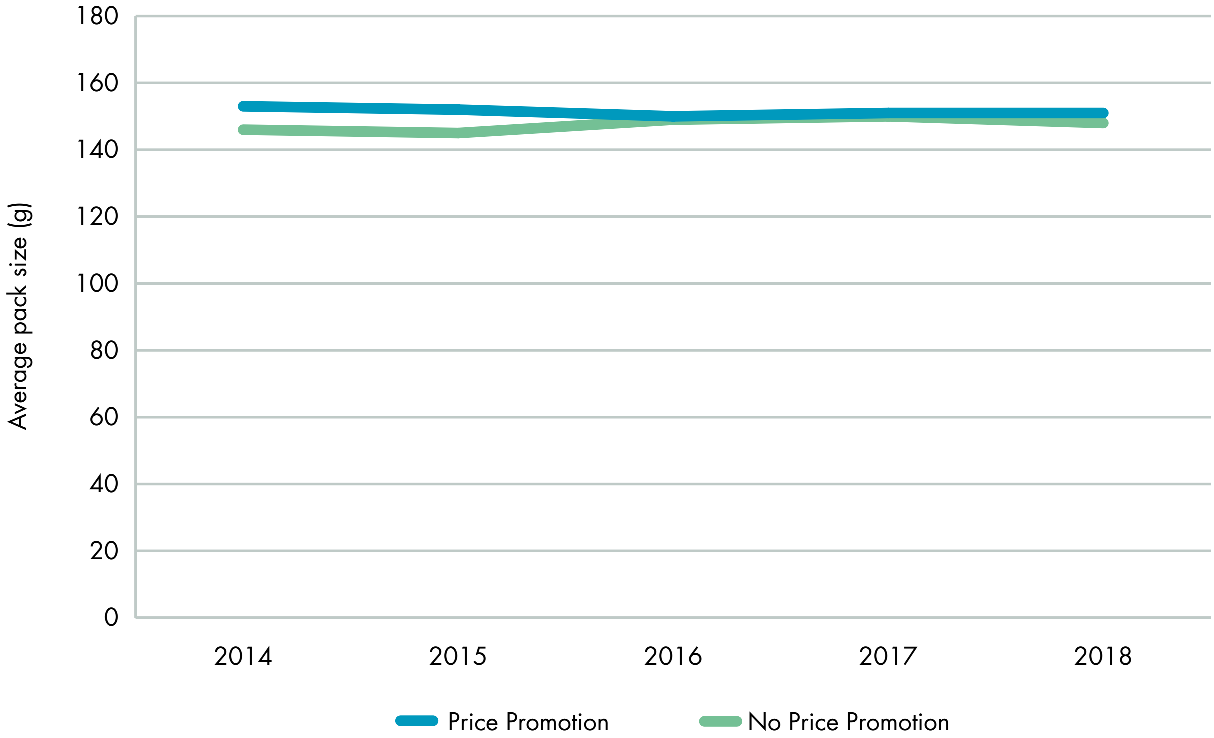
14.2.5 Average pack size of confectionery on and off price promotion

Figure 41 below shows the trends in the average pack size of confectionery purchased on price promotion, compared to those purchased without a price promotion.

In 2018, there was little difference in the average pack size of confectionery purchased on promotion (151g) and off promotion (148g).

Figure 41:

Average pack size of confectionery purchased on price promotion vs no promotion (2014-18)



14.3 Summary

These data showed that despite the increasing volumes of crisps and savoury snacks purchased between 2014 and 2018, the average pack sizes of most pack types have decreased. In 2018, multipacks were the most common pack type purchased within crisps and savoury snacks (around 50%) whilst the least purchased pack type were maxi packs (4%).

Volumes of confectionery purchased between 2014 and 2018 increased, but there has been little change in the average pack size of most pack types of confectionery. In 2018, sharing packs were the most common pack type within confectionery, representing 42% of all packs purchased, whereas single packs were purchased the least (18%).

15. Strengths and limitations

15.1 Strengths

The data set provided by Kantar has a sample size of around 2,650 household panellists, and is of sufficient size and representation to reflect the Scottish population in terms of social class, size and type of household. Data collected from the sample is weighted to represent all Scottish take home purchasing, therefore providing a robust dataset of retail purchase.

Nutrition information collected from product packaging is updated every four months, ensuring that any changes to product formulations are captured within the data set (provided they are published on the label by the manufacturer). The majority of nutrition information of products purchased by the panel is collected in this way.

Panel members scan the barcodes of all products purchased into the home, including non-food and drink products e.g. toiletries, household cleaning products. This information is used predominantly by the food and drink industry, but is also used by government departments to monitor purchasing patterns. Furthermore, the main panel is not asked specific questions relating to diet and/or health, reducing the likelihood of panel members changing their purchase patterns.

Trends are presented between 2014-18, providing five years of data. Kantar strive to maintain the continuity of the panel for as long as possible to ensure accuracy of trends.

15.2 Limitations

There are a number of limitations which should be considered when interpreting the data and results presented within the report.

The data presented relates to purchase only, and does not necessarily equate to consumption as waste and losses during preparation or cooking are not accounted for.

The results do not provide an overall picture of food and drink purchase in Scotland, as the data excludes foods and drinks purchased OOH and from takeaways. Around 20 to 25% of our calories are consumed OOH.[28] Furthermore, the balance of food and drink purchased into the home may be affected by purchase outside the home i.e. consumers may reduce the amount of food and drink they purchase into the home if they buy more outside the home.

Data presented is based on total volumes purchased for the population. Therefore, as the population has increased over time (around 1.2% since 2014), a concomitant rise in purchase is expected. Although data expressed per capita can help account for a rise in population, the data is not weighted according to sex and age.

28 Public Health England. Sugar Reduction: Achieving the 20% A technical report outlining progress to date, guidelines for industry, 2015 baseline levels in key foods and next steps (2017): https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/604336/Sugar_reduction_achieving_the_20_.pdf

Data on sugars relates to total sugars and not free sugars, which are the basis of current dietary recommendations. Free sugars would need to be estimated from total sugar contents available on nutrition labels. However, for many discretionary product categories it can be assumed that the majority (if not all) of the sugar contained within them is added by the manufacturer, and is therefore free sugar.

This analysis is based on 80 food and drink categories which collectively represent the total take home food and drink basket. These categories are pragmatically broad, for example to allow for sufficient sample sizes, therefore it is not possible to provide detail of specific brands and products within each category.

For some product categories, which tend to be sold loose (bread, rolls, morning goods, cakes and pastries), calorie and nutrient content values were provided per serving rather than per 100g due to the lack of information on the weight of the product.

Additionally, in this report, healthier categories have been compared with less healthy categories. However these are only a selection of healthier and less healthy categories and therefore comparison with other categories may alter the results.

Data on promotions relates only to price promotions, and does not include data on other forms of promotion such as product placement or advertising. Additionally, we are not able to infer from the data whether changes in purchase on promotion would result in any changes in calorie purchase.

16. Conclusion

This report complements and adds to the evidence base which supports action to limit the availability, advertising and promotion of high fat/salt/sugar products as recommended by FSS.[29]

The reduction in the purchase of sugar since 2014 is welcome. However, there have been increases in purchase of total fat, saturated fat and sodium over the same time period. Discretionary foods continue to contribute considerably to total purchase of calories, fats and sugars and there has been little change since 2014.

The results demonstrate a positive overall change within regular soft drinks. However, the rapid increase in both the purchase and average sugar content of drinks exempt from the levy (<5g/100ml) is notable and FSS will continue to monitor this trend, including any impact on total sugar purchase in Scotland.

Despite promotions overall having declined since 2014, the data presented showed that, in 2018, around a third of the retail food and drink purchased in Scotland was on a price promotion, with the majority via TPR. Price promotions are designed to increase the amounts purchased, and this report provides evidence that purchase on promotion is currently skewed towards less healthy and discretionary products, highlighting the need for change and a shift towards healthier purchasing.

29 Food Standards Scotland. Proposals for setting the direction for the Scottish diet, one year on (2017): https://www.foodstandards.gov.scot/downloads/Board_meeting_-_2017_March_08_-__Diet_and_Nutrition_one_year_on_0.pdf

17. Annexe 1: Top 20 food and drink categories contributing to purchase of total calories, total fat, saturated fat, total sugars and sodium in Scotland

Table 1:
Top 20 food and drink categories contributing to total take home purchase of calories in Scotland (2014 vs 2018)

Category	% of total calorie purchase 2014	% of total calorie purchase 2018
Total bread and morning goods (ambient)	11.2%	11.1%
Total biscuits	6.8%	6.8%
Total milk	5.7%	5.7%
Total red meat and products	5.7%	5.7%
Total ambient take home confectionery	5.3%	5.7%
Yellow fats	5.3%	4.8%
Cakes and pastries	4.3%	4.5%
Savoury home cooking (excl. salt)	4.3%	4.1%
Total alcohol	4.2%	4.1%
Crisps and savoury snacks	3.6%	4.0%
Total breakfast cereals (incl. rolled oats and oatmeal)	3.8%	3.6%
Total fruit	3.1%	3.2%
Total cheese	2.9%	3.1%
Total poultry and products	2.5%	2.8%
Total plain and sweet potatoes	2.2%	2.2%
Total vegetables and salad leaves	2.0%	2.2%
Regular soft drinks	2.8%	2.1%
Table sugar	2.5%	2.1%
Ready meals	1.9%	2.0%
Plain starchy carbohydrates (excl. potatoes and sweet potatoes)	1.9%	1.8%

The top 20 contributors provided 82% of total take home calorie purchase in Scotland in 2018.

Table 2:
Top 20 food and drink categories contributing to total take home purchase of total fats in Scotland (2014 vs 2018)

Category	% of total fat purchase 2014	% of total fat purchase 2018
Yellow fats	14.7%	13.3%
Total red meat and products	8.9%	8.7%
Total biscuits	7.2%	7.2%
Savoury home cooking (excl. salt)	7.7%	7.1%
Total cheese	5.9%	6.0%
Total ambient take home confectionery	5.4%	5.8%
Crisps and savoury snacks	5.3%	5.7%
Total milk	5.6%	5.7%
Total bread and morning goods (ambient)	4.6%	4.4%
Cakes and pastries	4.2%	4.4%
Total poultry and products	2.8%	3.0%
Total pickle, table sauce and condiment	1.9%	2.2%
Savoury pies and pasties (ambient, chilled and frozen)	2.4%	2.2%
Ready meals	2.1%	2.1%
Total cream	1.8%	1.7%
Frozen processed potatoes (incl. chips)	1.4%	1.4%
Total vegetables and salad leaves	1.3%	1.3%
Total breakfast cereals (incl. rolled oats and oatmeal)	1.2%	1.2%
Total puddings and desserts	1.2%	1.1%
Total fish	1.2%	1.1%

The top 20 contributors provided 86% of total take home total fat purchase in Scotland in 2018.

Table 3:
Top 20 food and drink categories contributing to total take home purchase of saturated fats in Scotland (2014 vs 2018)

Category	% of total saturated fat purchase 2014	% of total saturated fat purchase 2018
Yellow fats	15.3%	13.9%
Total cheese	9.6%	9.9%
Total biscuits	9.0%	9.1%
Total red meat and products	9.2%	8.9%
Total milk	8.6%	8.9%
Total ambient take home confectionery	8.1%	8.6%
Cakes and pastries	4.2%	4.6%
Total bread and morning goods (ambient)	3.3%	3.4%
Total cream	3.0%	2.9%
Savoury home cooking (excl. salt)	3.0%	2.9%
Savoury pies and pasties	2.7%	2.4%
Ice cream and edible ices (excl. frozen dairy desserts)	2.3%	2.1%
Ready meals	2.0%	2.1%
Total poultry and products	1.8%	1.9%
Total puddings and desserts	1.8%	1.7%
Crisps and savoury snacks	1.6%	1.7%
Total yoghurt	1.2%	1.5%
Pizza	1.1%	1.2%
Sweet home cooking	1.2%	1.0%
Total breakfast cereals (incl. rolled oats and oatmeal)	0.9%	0.8%

The top 20 contributors provided 89% of total take home saturated fat purchase in Scotland in 2018.

Table 4:
Top 20 food and drink categories contributing to total take home purchase of total sugar in Scotland (2014 vs 2018)

Category	% of total sugar purchase 2014	% of total sugar purchase 2018
Total fruit	12.1%	13.1%
Total ambient take home confectionery	11.5%	12.9%
Total milk	9.3%	9.8%
Table sugar	10.9%	9.5%
Regular soft drinks	11.0%	8.3%
Total biscuits	7.0%	7.5%
Cakes and pastries	5.5%	6.1%
Total bread and morning goods	3.4%	3.9%
Total vegetables and salad leaves	3.2%	3.6%
Sweet home cooking (excl. sugar)	3.4%	3.2%
Total breakfast cereals (incl. rolled oats and oatmeal)	3.2%	2.8%
Pure fruit juice	2.6%	2.6%
Breakfast spreads	2.5%	2.5%
Total yoghurt	2.4%	2.3%
Total puddings and desserts	2.2%	2.2%
Ice cream and edible ices (excl. frozen dairy desserts)	2.0%	1.9%
Total pickle, table sauce and condiment	1.6%	1.7%
Total alcohol	2.2%	1.5%
Savoury home cooking (excl. salt)	1.2%	1.1%
Ready meals	0.6%	0.7%

The top 20 contributors provided 97% of total take home total sugar purchase in Scotland in 2018.

Table 5:
Top 20 food and drink categories contributing to total take home purchase of sodium in Scotland (2014 vs 2018)

Category	% of total sodium purchase 2014	% of total sodium purchase 2018
Total red meat and products	12.9%	12.1%
Table salt	12.0%	12.0%
Total bread and morning goods (ambient)	13.1%	11.8%
Savoury home cooking (excl. salt)	7.3%	6.8%
Total cheese	4.2%	4.4%
Total milk	3.2%	3.9%
Crisps and savoury snacks	3.3%	3.5%
Total biscuits	3.5%	3.3%
Total pickle, table sauce and condiment	3.0%	3.2%
Yellow fats	3.3%	2.8%
Ready meals	2.6%	2.7%
Total poultry and products	2.3%	2.4%
Cakes and pastries	2.4%	2.2%
Total fish	1.7%	1.6%
Savoury pies and pasties (ambient, chilled and frozen)	1.6%	1.4%
Pizza	1.4%	1.4%
Total breakfast cereals (incl. rolled oats and oatmeal)	1.8%	1.4%
Total vegetables and salad leaves	0.9%	1.2%
Frozen processed potatoes (incl. chips)	1.1%	1.1%
Total ambient take home confectionery	0.9%	0.9%

The top 20 contributors provided 80% of total take home sodium purchase in Scotland in 2018.

18. Annexe 2: Food and drink categories included in top 20 contributors to purchase of energy, fats, sugars and salt: Kantar definitions[30]

Category	Kantar Definition
Total bread and morning goods	All bread and rolls including pre-packed, part-baked and freshly baked, plain and fruit scones, crumpets, pikelets, English muffins, scotch pancakes, bagels, croissants, waffles etc.
Total biscuits	All sweet and savoury biscuits.
Total milk	All milk including buttermilk and soya milk.
Total red meat and products	All fresh, canned, frozen, processed red meat or red meat products including burgers, grills, bacon and offal.
Total ambient take home confectionery	All ambient sugar and chocolate confectionery and chewing gum.
Yellow fats	Includes butter, spreads, lard and dripping.
Cakes and pastries	All ambient cakes and pastries including pies, plans and tarts. All higher fat and/or sugar morning goods including tea cakes, croissants, scones, iced buns, waffles and other morning pastries.
Savoury home cooking	Includes ambient cooking sauces, cooking oils, ethnic ingredients, flour, herbs, spices, meat extract, packet stuffing, suet, sweet and savoury mixes and vinegar, excludes salt.
Total alcohol	All alcoholic drinks, including wine, spirits, beer and cider.
Crisps and savoury snacks	Includes crisps, popcorn, savoury snacks and nuts.
Total breakfast cereals	All breakfast cereals including granola, instant porridge, muesli, porridge oats and ready to eat cereals.
Total fruit	All fresh, chilled, frozen and tinned fruit.
Total cheese	All hard and soft cheese including continental and specialty cheeses.
Total poultry and products	All fresh, chilled, frozen, raw and cooked poultry or poultry products.
Total plain and sweet potatoes	All fresh and canned plain and sweet potatoes.
Total vegetables and salad leaves	All fresh, chilled, pre-prepared, frozen and canned vegetables including canned beans and herbs but excluding potatoes and sweet potatoes.
Regular soft drinks	All ambient and chilled soft drinks with added sugar, including squash, fruit juice and all carbonated drinks. Excludes all still, carbonated and flavoured waters (excluding soda).

30 All other definitions of food/drink categories available from FSS on request.

Table sugar	All white and brown granulated, caster, icing and cubed sugar.
Ready meals	Chilled, frozen and canned ready meals including English, Italian, Indian and Chinese etc.
Plain starchy carbohydrates	Includes plain, fresh and dry pasta, rice, noodles and cous cous excluding potatoes, sweet potatoes and bread.
Total pickle, table sauces and condiment	All ambient table sauces including salad cream, horseradish sauces, hollandaise sauces, tomato ketchup, mustard, dips, pickles, chutney, relishes.
Savoury pies and pasties (ambient, chilled and frozen)	All fresh, frozen and canned pies, pasties and sausage rolls.
Total cream	All fresh, flavoured and synthetic cream.
Frozen processed potatoes (incl. chips)	All frozen potato products including chips.
Total puddings and desserts	Ambient, chilled, canned, powdered and frozen desserts including jellies, sponge puddings, rice pudding, custard, mousses and cheesecakes.
Total fish	All canned, fresh and frozen fish and fish products.
Ice cream and edible ices (excl. frozen dairy desserts)	All ice cream, including filled cones, cups and tubs, choc ices and sorbets.
Total yoghurt	All yoghurt including low fat, plain and flavoured.
Pizza	All chilled and frozen pizzas including pizza bases and pizza kits.
Sweet home cooking	Includes long life desserts, syrup and treacle, table and quick set jellies, baking fruit, snacking fruits and nuts, evaporated and condensed milk and non-dairy cream.
Pure fruit juice	All ambient or chilled pure fruit juice.
Breakfast spreads	Includes jam, marmalade, chocolate spread, peanut butter, fruit curds and honey.
Table salt	All table salt.

19. Annexe 3: Percentage nutritional volume purchased on price promotion in Scotland, by promotion type (2014 vs 2018); healthier vs less healthy

Category	TPR		Y for £X		Multi-buy		Other		Price-Marked Packs	
	2014	2018	2014	2018	2014	2018	2014	2018	2014	2018
Ice cream and edible Ices (excl. frozen dairy desserts)	25	25	9	8	*	*	12	4	*	1
Puddings and desserts	27	27	16	10	1	*	1	1	2	1
Crisps and savoury snacks	33	36	14	10	4	*	1	*	1	1
Sausages	23	22	14	10	*	*	4	4	2	*
Savoury pies and pasties	25	26	11	7	*	*	6	2	2	1
Total confectionery	37	34	9	9	1	0	0	0	1	0
Total cakes and pastries	20	22	14	11	1	*	2	2	1	0
Total biscuits	32	32	9	5	1	*	1	0	1	0
Regular soft drinks	24	28	28	13	3	*	1	1	1	1
Plain potatoes	38	23	5	1	*	*	4	3	*	*
Plain bread	18	9	10	2	*	*	2	0	*	*
Plain starchy carbohydrates	17	18	6	3	*	*	1	*	1	1
Plain oil rich fish	25	16	12	9	*	*	2	*	*	*
Total vegetables and salad leaves	23	17	4	3	0	1	4	2	1	0
Total fruit	19	19	8	6	0	*	4	1	0	0
Water	12	19	21	6	*	*	*	*	*	*
Diet soft drinks	29	32	30	15	4	*	*	1	2	1

**no data available due to small sample size*

20. Annexe 4: Average calorie, total fat, saturated fat, total sugar and sodium content of branded and private label discretionary categories 2014

2014

Category	Kcal/100g		Total Fat (g/100g)		Saturated Fat (g/100g)		Total Sugar (g/100g)		Sodium (g/100g)	
	Branded	Private label	Branded	Private label	Branded	Private label	Branded	Private label	Branded	Private label
Confectionery	457.9	443.3	18.9	16.4	11.0	9.5	56.5	54.6	0.1	0.1
Biscuits	466.2	472.1	19.6	19.9	9.4	10.1	28.3	25.5	0.3	0.3
Cakes and pastries	167.7	186.2	6.4	7.3	2.4	2.9	12.2	13.3	0.1	0.1
Crisps and savoury snacks	510.0	528.4	28.9	32.4	3.4	4.1	3.8	4.2	0.6	0.6
Regular soft drinks	42.1	40.9	0.1	0.1	0.0	0.0	9.4	9.1	0.0	0.0
Regular soft drinks subject to the levy (>5g/100ml)	45.5	46.6	0.1	0.1	0.0	0.1	10.3	10.5	0.0	0.0
Regular soft drinks exempt from the levy (<5g/100ml)	21.2	13.4	0.0	0.0	0.0	0.0	4.1	2.6	0.0	0.0
Puddings and desserts	162.8	200.4	5.5	8.4	3.2	4.9	17.0	18.8	0.1	0.1
Ice cream and edible ices (excl. frozen dairy desserts)	212.2	173.6	10.5	7.9	7.1	5.6	21.7	18.0	0.1	0.0

About Food Standards Scotland

Food Standards Scotland (FSS) is the public sector food body for Scotland. We are here to ensure that information and advice on food safety and standards, nutrition and labelling is independent, consistent, evidence-based and consumer-focused.

Our primary concern is consumer protection – making sure that food is safe to eat, ensuring consumers know what they are eating and improving nutrition. With that in mind, our vision is to deliver a food and drink environment in Scotland that benefits, protects and is trusted by consumers.

FSS was established by the Food (Scotland) Act 2015 as a non-ministerial office, part of the Scottish Administration, alongside but separate from the Scottish Government. We are mainly funded by the government but we also charge fees to recover costs for regulatory functions.

See more at: **foodstandards.gov.scot/about-us**

Food Standards Scotland
4th Floor
Pilgrim House
Aberdeen
AB11 5RL

enquiries@fss.scot

foodstandards.gov.scot

@FSScot

@FSScot

Prepared by Gillian Campbell, Alana McDonald, Lyndsay Davidson and Leanne Garden, Nutrition Science and Policy Branch at Food Standards Scotland.