



Co-op Food
Part of the co-operative group

TESCO

Waitrose

Sainsbury's

Somerfield
giving you what you want

ASDA
part of the **WAL-MART** family



Animal Aid's National Vegetarian & Vegan-Friendly Supermarket Survey



Animal Aid

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Introduction Survey results

In August 2006, Animal Aid launched a nationwide survey to find Britain's most vegetarian* & vegan** friendly supermarket chain by asking members and supporters of Animal Aid to visit their local store and complete a survey form while there. The form featured 25 simple questions, ten of which were mandatory. It asked what alternatives to meat and dairy products were available, the number of brands on offer, whether the products were labelled as 'suitable for vegetarian and vegans' and whether the in-store location of these foods was convenient. Participants were given the opportunity to comment on the extent of vegetarian and vegan provision in supermarkets. In total, 622 supermarkets were surveyed.

The winners of the 2007 Animal Aid Vegetarian & Vegan Supermarkets of the Year are **Morrisons** for its vegetarian provision and **Waitrose** for its vegan provision.

Waitrose scored 55 per cent for its vegan provision but, surprisingly, its score of 65 per cent for vegetarian provision did not come top. Waitrose just lost out to Morrisons, which scored 69 per cent, as it has a slightly wider range of ready-made and frozen vegetarian products. Overall, however, Waitrose was found to be the most vegetarian and vegan-friendly supermarket group in Britain, owing to its provision of meat-and dairy-free products across the spectrum.

Waitrose is renowned for its ethical stance and this latest award follows last year's announcement that it had been named the most farm animal-friendly supermarket chain by Compassion in World Farming.

* Vegetarian: foods that contain no meat or fish, or derivatives or by-products of meat or fish

** Vegan: foods that contain no animal products at all including meat, fish, milk, eggs and honey

A month later, it was named as the most environmentally friendly supermarket group in a study by the National Consumer Council.

Winning Branch

Overall, the winning branch was Waitrose's Beaconsfield store.

How many vegetarians are there in Britain?

According to a study by the leading market research company, Consumer Analysis Group, six per cent of the population is totally vegetarian and a further 2000 people a week stop eating meat. Already, 40 per cent of the population avoid eating meat at least once a week.¹ Britain has the second largest number of vegetarians in Europe after Germany, with the UK vegetarian food market valued at £700 million in 2006.² There is also a rising population of vegans in Britain, currently estimated to be around 250,000.³

Also, an increasing number of people – who would not describe themselves as vegetarian – choose to purchase non-animal foods. It is, therefore, important that there is a choice of food products for this consumer sector, especially considering that the UK retail market for vegetarian food is increasing by eight per cent, year on year.⁴

In 2003, a Safeway (now Morrisons) spokesperson stated: 'Supermarkets have had a positive impact on the numbers of people becoming vegetarian in the last 50 years – especially by increasing the variety of products available. Our task must be to provide a total vegetarian solution: not just more fruit and vegetables, but more innovative products that offer customers choice and a sound nutritional balance.' This aspiration is borne out by their top rating in our survey.



Survey Results

A 'veggie-friendly' rating was calculated for each supermarket chain by taking the mean average of the scores for every one of its stores surveyed. Each of the 25 questions was assigned a maximum score according to its importance.

Vegetarian & Vegan

Britain's most vegetarian & vegan-friendly supermarket

In this category, provision of meat-free as well as dairy-free produce was noted and scored. The highest mark available when evaluating provision for vegetarians and vegans was 66.

Supermarket	Score	Percentage
Waitrose	36.02	55
Morrisons	33.04	50
Sainsbury's	32.72	50
ASDA	30.53	46
Tesco	28.04	42
Co-op	19.35	29
Somerfield	18.27	28

- **Waitrose scored well on most questions**, particularly with its meat and fish alternatives, as well as with its wide range of vegan products, such as non-dairy cheese, milks, yoghurt and ice cream.
- Areas where Waitrose did not score so well were the provision of vegan ready-made and frozen meals, own-brand vegetarian/vegan products and labelling goods that are suitable for vegans.
- **Somerfield had the worst provision**, managing just half of Waitrose's score.
- Somerfield fared quite badly on most questions, especially those regarding the provision for vegans.

- They also fell down on vegan labelling and own-brand vegetarian products. The chain picked up points on the provision of vegetarian ready-meals and frozen products.

Vegetarian

Britain's most vegetarian-friendly supermarket

The highest score available when evaluating provision for vegetarians (and ignoring provision for vegans) was 27.

Supermarket	Score	Percentage
Morrisons	18.59	69
Sainsbury's	18.22	67
ASDA	17.74	66
Waitrose	17.67	65
Tesco	14.33	53
Somerfield	12.82	47
Co-op	9.80	36

- The results were somewhat different when the questions relating only to the provision of vegetarian food were analysed. **Morrisons scored the highest with 18.59 points out of 27.** However, Sainsbury's, ASDA and Waitrose were not far behind, with less than one point between them.
- **Tesco, Somerfield and the Co-op scored the worst.** The Co-op had the lowest score with 9.8. This may be related in part to the small size of their stores and their consequent inability to stock a large range of vegetarian goods.



Vegan

Britain's most vegan-friendly supermarket

The highest score available when evaluating provision for vegans was 31.

Supermarket	Score	Percentage
Waitrose	15.16	49
Morrisons	11.41	37
Tesco	10.81	35
Sainsbury's	10.65	34
ASDA	9.99	32
Co-op	7.17	23
Somerfield	4.97	16

- **Waitrose is the most vegan-friendly supermarket due to its range of products offering alternatives to dairy, meat and fish items.** However, there is still room for improvement as it scored just half of the points available.
- **Somerfield's provision for vegans is sorely lacking.**

Region

Britain's most vegetarian & vegan-friendly supermarket region

The highest score available when evaluating regions was 66.

Region	Score	Percentage
East Anglia	33.68	51
North East	32.79	50
South East	31.88	48
North West	31.72	48
South Wales	31.31	47
London	30.87	47
Midlands	30.72	47
South West	29.48	45
Scotland	29.38	45
North Wales	28.73	44

REGIONS:

North East: Northumberland, Tyne & Wear, Durham, Yorkshire, Derbyshire, Lincolnshire.

North West: Cumbria, Lancashire, Merseyside, Gr. Manchester, Cheshire.

Midlands: Nottinghamshire, Leicestershire, Northamptonshire, Warwickshire, Worcestershire, W. Midlands, Shropshire, Staffordshire.

East Anglia: Norfolk, Suffolk, Cambridgeshire.

South East: Essex, Hertfordshire, Bedfordshire, Buckinghamshire, Oxfordshire, Berkshire, Middlesex, Hampshire, Surrey, W. Sussex, E. Sussex, Kent.

South West: Dorset, I.O.W, Channel Is, Wiltshire, Gloucestershire, Somerset, Devon, Cornwall.

- **East Anglia is Britain's most vegetarian & vegan-friendly supermarket region, scoring more than half of the points available.**

- The top three regions are all in the east of the country.

Labelling

Supermarket with best vegetarian & vegan labelling

The highest score available when evaluating labelling was 4.

- **With their excellent labelling policy for vegetarians and vegans, Sainsbury's scored the highest.** Waitrose lost out as a result of their lack of labelling for vegans.
- **Somerfield scored particularly badly in this area.**

Supermarket	Score	Percentage
Sainsbury's	2.61	65
Waitrose	2.27	57
Co-op	2.23	56
Tesco	2.17	54
Morrisons	2.04	51
ASDA	2.00	50
Somerfield	1.33	33



Convenience

Do supermarkets place their vegetarian food in convenient places?

Supermarket	Percentage of respondents who answered yes
Waitrose	68
Morrisons	67
Co-op	56
Tesco	55
ASDA	55
Sainsbury	55
Somerfield	27

- At least half of all respondents felt their local supermarket placed its vegetarian food in convenient places.
- **Waitrose's and Morrisons' in-store placement of vegetarian food was more agreeable to their customers than other supermarkets.**
- Somerfield was the only chain that did not score over 50 per cent satisfaction. Seventy-three per cent of the participants who surveyed Somerfield did not feel that the store placed its vegetarian products in a convenient location.

Participants

Diet of survey participants

Respondents	Number of people	Percentage of people in survey
Vegetarian	264	46
Vegan	247	43
Pescatarian	46	8
Meat eater	20	3
Total	577	100

- A large majority of respondents do not eat meat and there is a broadly even split between those who are vegetarian and those who are vegan.
- Pescatarians eat fish but not meat.

Conclusion

Our survey shows that while some supermarkets provide a good range of vegan and especially vegetarian foods, and stock a wide selection of fresh, frozen and chilled products, others have a very long way to go.

As the number of vegetarians and vegans in Britain continues to rise, along with the growing number of meat reducers and avoiders, it is important that they have access to non-animal foods. Supermarkets have been blamed for squeezing out independent stores including healthfood shops, and it is, therefore, vital that they provide a full range of vegetarian and vegan produce that might not be available elsewhere on the high street.

In line with the popularity of vegetarianism, there is constant growth in the vegetarian food market. Food manufacturers now provide an impressive range of non-animal foods, including meat alternatives and vegetarian ready-meals and frozen products. While such products are available from manufacturers, our survey shows that most supermarkets currently stock only a small selection of these and do not offer their vegetarian customers adequate choice.

In all supermarkets, the provision for vegan customers is relatively small and, in some, it is virtually non-existent. While the best supermarket for vegan shoppers – Waitrose – stocks a range of vegan products such as cream, ice-cream, mayonnaise, cheese and cakes, little is offered in the way of vegan ready-meals, frozen produce and chilled meat alternatives.

The lack of vegetarian and vegan provision in supermarkets such as

**Survey results
Conclusion**



Somerfield and the Co-op is perhaps influenced by the size of their stores, which tend to be smaller than those of the larger chains, such as Sainsbury's and Waitrose. Shelf space is at a premium and, in these stores, vegetarians miss out. But by not stocking vegetarian foods, the supermarkets are neglecting a growing market and also preventing ethically-minded and health-conscious individuals from switching to a low-meat or meat-free diet. There is also a significant proportion of the population who are lactose-intolerant and would welcome more dairy-free alternatives.

Some supermarkets with an adequate range of vegan products do not label them clearly and so are not reaching their target customers. This means vegan consumers must check ingredients lists on the back of products, which, due to inadequate labelling, does not always guarantee that they are vegan. Staff are rarely able to advise. There was a survey-wide demand for better labelling of vegan products. However, the majority of supermarkets have now adopted vegetarian labelling of their own-brand products, which is an important aid to their customers.

Many survey respondents suggested that stocking all dairy-free chilled items together would make them much easier to find. Currently, frozen vegetarian foods are conveniently located together in most supermarkets but it is not always easy to find dairy-free alternatives to milk, cheese and yoghurts. They are often difficult to identify among the huge range of dairy equivalents. Keeping these chilled items together – along with 'fake' meats – would make them easier to locate and, with appropriate signage, would alert people to the available range of chilled vegan items.

Summary

- In general, supermarkets stock an adequate range for vegetarian customers and many are improving in their provision of vegan products.
- Our survey respondents wanted a larger range of chilled and frozen products in their supermarkets.
- In particular, there was a lack of supermarket-own vegetarian and vegan products.
- Better labelling of vegan products and improved signage within the store were common requests.

References

- 1) Tanitha Carey, 'We will turn veggie by 2047', *Daily Mirror*, 19 May 2003.
- 2) 'Veggie Sales Rise to 700 Million', *Metro* 5 February 2007.
- 3) Food Standards Agency, 'Guidance on vegetarian and vegan labelling'. <http://www.food.gov.uk/news/newsarchive/2006/apr/vegvegan>
- 4) BBC Health Awareness Campaign, May 2006.

A special report by Animal Aid
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peacefully against all animal abuse,
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