Healthy & Sustainable Diets
Investor Deep Dive

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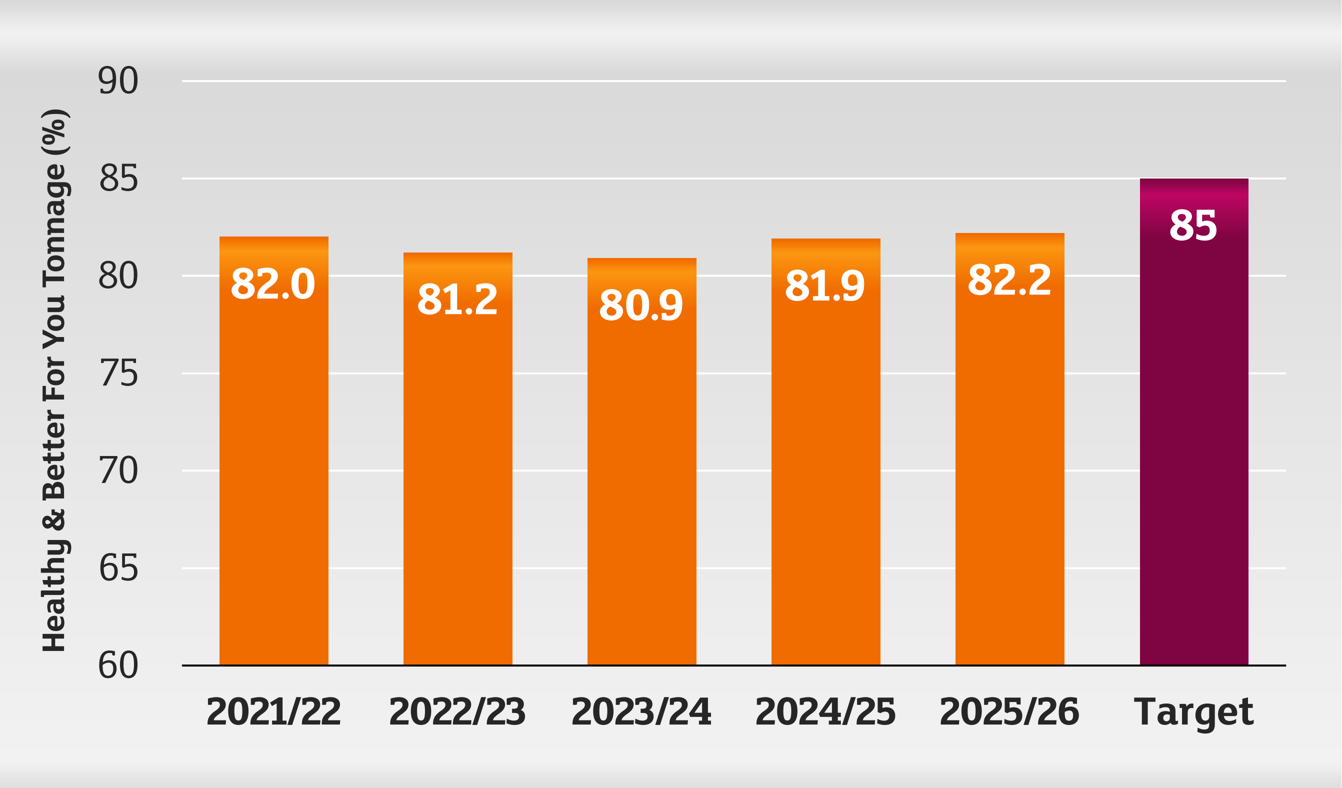
2021 – 2026 Health strategy learnings

Performance against our 2021 healthy sales target



Own Brand Performance = 89% (0.0ppt vs baseline)

Setting the baseline

- 2021/22 baseline reflected COVID-19 purchasing patterns
- Progress has then been influenced by subsequent inflationary pressures and changing habits

Understanding key drivers

- Splitting food and drink is important for understanding key drivers

Agreeing actionable targets

- Focusing targets against specific areas drives action at commercial level

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HFSS placement regulations have driven a 0.7% reduction in sales of in-scope products

Reformulation within legislative categories has played a critical role

- Regulations have reduced HFSS sales
- Improvement in healthiness in 11 out of 13 legislative category levels pre and post legislation[1]
- We continue to push for stronger enforcement to ensure regulations deliver intended impact

Reformulation has driven more of the impact than product placement

Table below shows % HFSS tonnage changes in **exempt** channels – pre and post implementation

	Before HFSS Legislation	After HFSS Legislation	Reduction (p.p)
In scope England Stores	9.1%	8.5%	0.7ppt
Wales Stores	9.6%	9.0%	0.5ppt
Scotland Stores	9.7%	9.1%	0.6ppt

- Before HFSS Legislation – 2021/2022 and 2022/2023 up to October
- After HFSS Legislation – 2022/2023 post October, 2023/2024, 2024/2025 and 2025/2026
- An independent T-test was performed to confirm that the reduction in tonnage is statistically significant and can be attributed to the placement regulations in both eligible stores and stores that were exempt from regulations

1. Definitions: Pre (2021/22) and Post (2023/24, 2024/25 and 2025/26)

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Demonstrating credible health progress:
Healthier innovation & reformulation

- **Reformulation performance:** Sugar tonnage reduction by 27% in the top 5 sugar contributing categories since 2015[1]
- **Dietary filters:** 28 new product filters introduced on Groceries Online
- **Healthy Choice logo:** Introduced on >1,250 products across our own-brand range

Healthy Choice

Latest innovation

Became the first UK supermarket to offer **Vitamin D-enhanced white mushrooms**

Launched Small but Mighty, a range of nutrient-rich meals developed in partnership with specialist dietitian

UK-first own-brand juices and shots use lower-sugar juices, resulting in up to 45% less sugar vs standard juices

Free From range with dedicated space in store

Kids product innovation– e.g. plain no added sugar yogurts

Introduction of Veg Forward sub brand for veg led plant-based options

1. Plan for Better Databook 2025/26. Result from 2023/24

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Demonstrating credible health progress:
Value investment to make healthy choices more affordable

- **Invested c.£1.3 billion in value** over last 5 years
- For last 3 years, at least **75% of our Aldi Price Match campaign** products have been Healthy or Better For You choices
- **4 years of market outperformance** on fruit and vegetable sales growth
- Tested and re-introduced **multibuys on a range of healthier lines**

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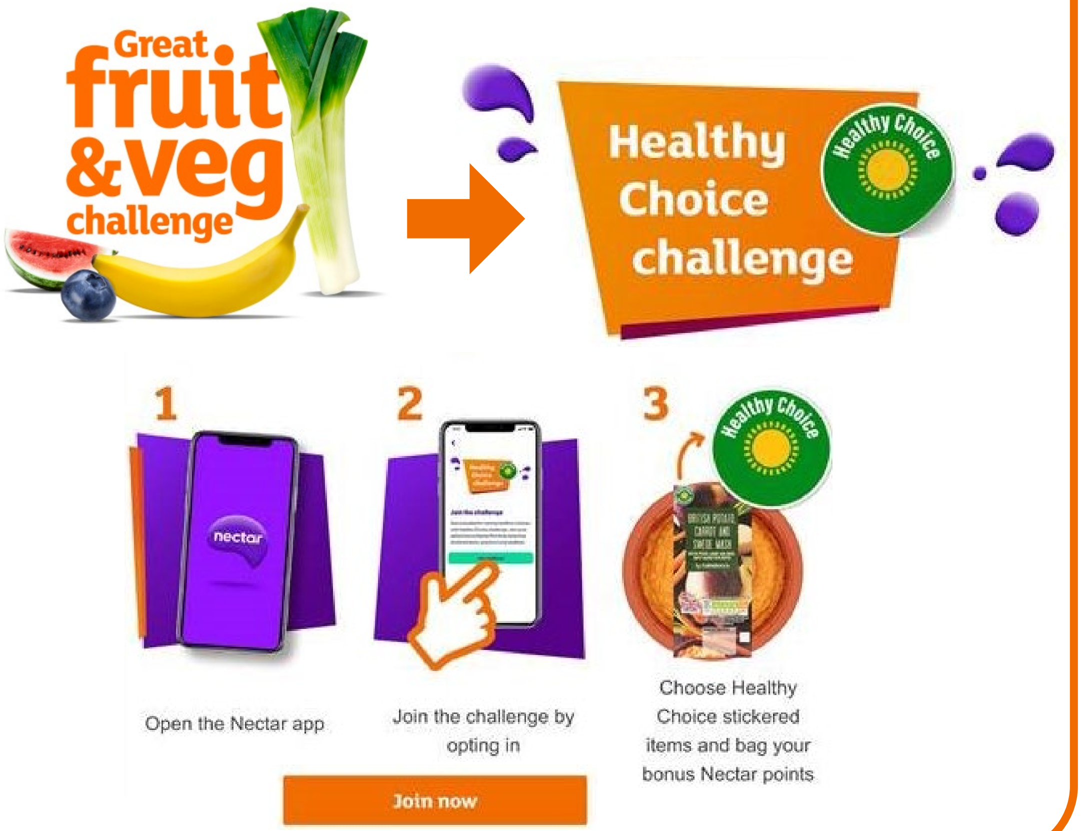
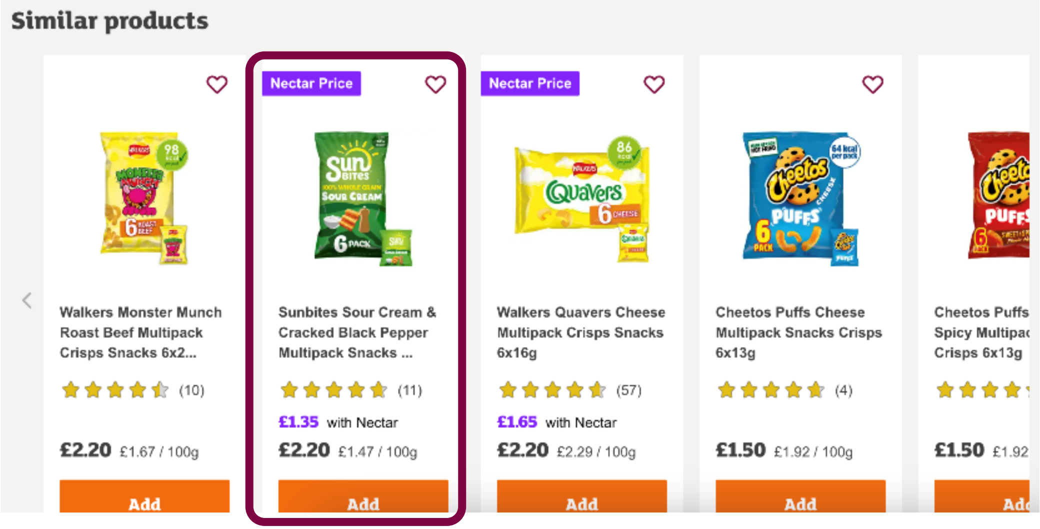
Demonstrating credible health progress:
Utilising rewards, incentives, nudging and gamification

Our newest interaction – Healthy Choice Challenge



Similar product recommendations



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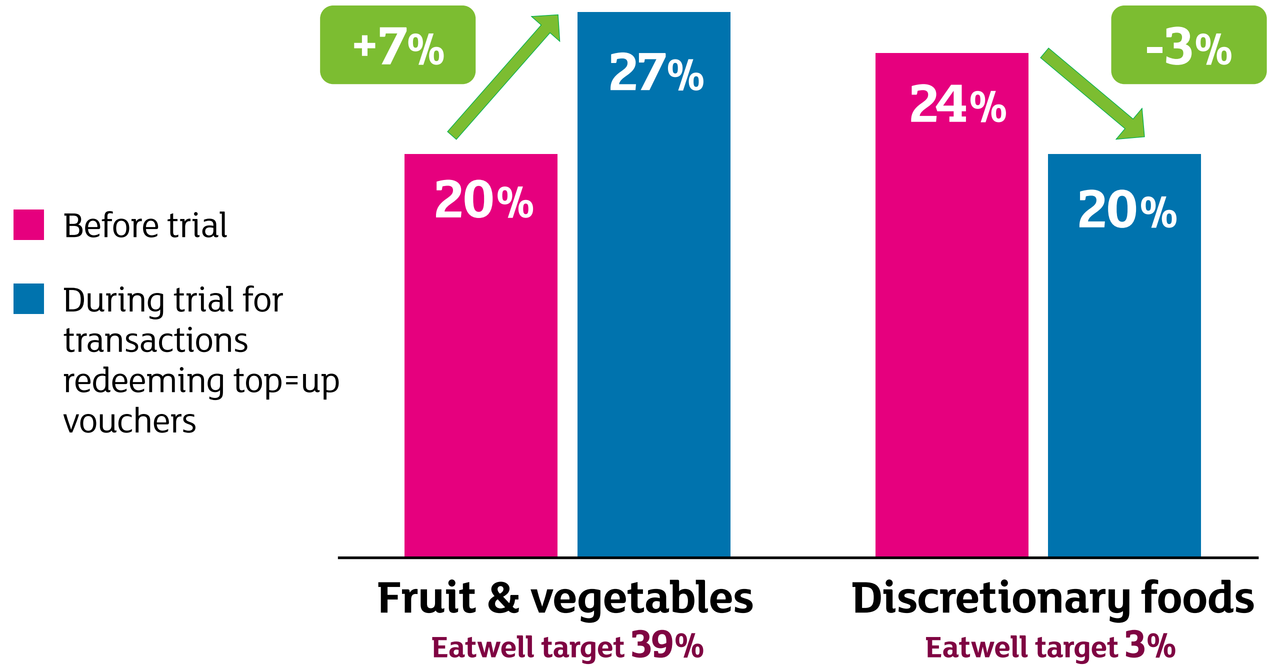
Demonstrating credible health progress:
Support for low-income customers

Healthy Start Top Up trial

Purchasing habits compared with Eatwell Guide



Fruit and veg purchases – c.13 more portions per basket

Proportion treat purchases

The **health landscape** today

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The UK is facing a diet related disease epidemic

Nearly 2/3 UK adults are overweight

64% of adults in England were overweight or obese in 2022[1]

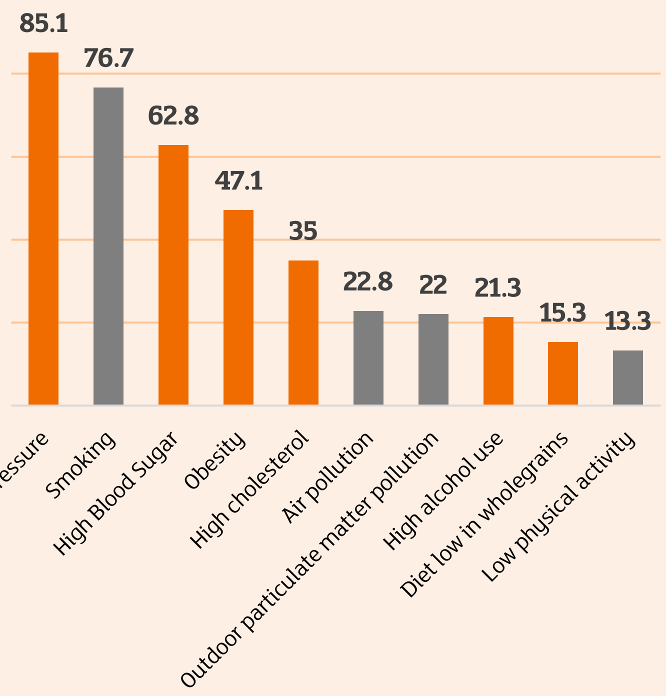
27% of children in England were overweight or obese in 2022[1]

Significant implications for productivity and growth

£126bn Overall yearly cost of obesity and excess weight to UK economy[2]

Top 6 mortality risk factors are diet related

UK Annual Deaths by Risk Factor, '000s (2023)[3]



Problem likely to get worse as children and families not given sufficient support

<50% of children achieve recommended activity levels[4]

1 in 5 Children aged 5 have experience tooth decay in England[5]

1. Health Survey for England (2022), 2. The economic and productivity costs of obesity and excess weight in the UK, Nesta (2025), 3. IHME, Global Burden of Disease (2025),
4. Children's activity levels rising but inactivity remains too high | Sport England (2025), 5. Supervised toothbrushing for children to prevent tooth decay - GOV.UK

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Increasing focus on health is impacting shopping habits

Health is increasingly important to customers…

>75% of customers would like their **diet to be healthier**[1]

>60% of primary customers have concerns about **Ultra Processed Foods**[2]

c.6% of UK adults now use GLP-1s, doubled year-on-year[3]

40% of UK consumers have **increased their protein intake**[4]

1 in 4 Households are searching for **high in fibre foods**[5]

… but customers say there are barriers to eating healthily

Affordability	c.65% of customers believe **healthy food is expensive or never on offer**[6]
Inspiration	46% customers eat the same meal on the same night each week[7]
Time & Effort	c.25% of customers want **healthy food to be easier to find in-store**[8]

1. Sainsbury's Barriers to Healthy Eating 2022 Research 2. Sainsburys Customer Insights 2025 3. IGD, April 2026 4. Kantar usage panel – 52 weeks ending December 2024
5. Kantar Sainsbury's Consumer Health Perceptions May 25 6 Kantar who cares? Survey 2025 7.Veg Power presentation to Sainsbury's in 2025 8. Sainsbury's Health x Cost of Living research January 2023

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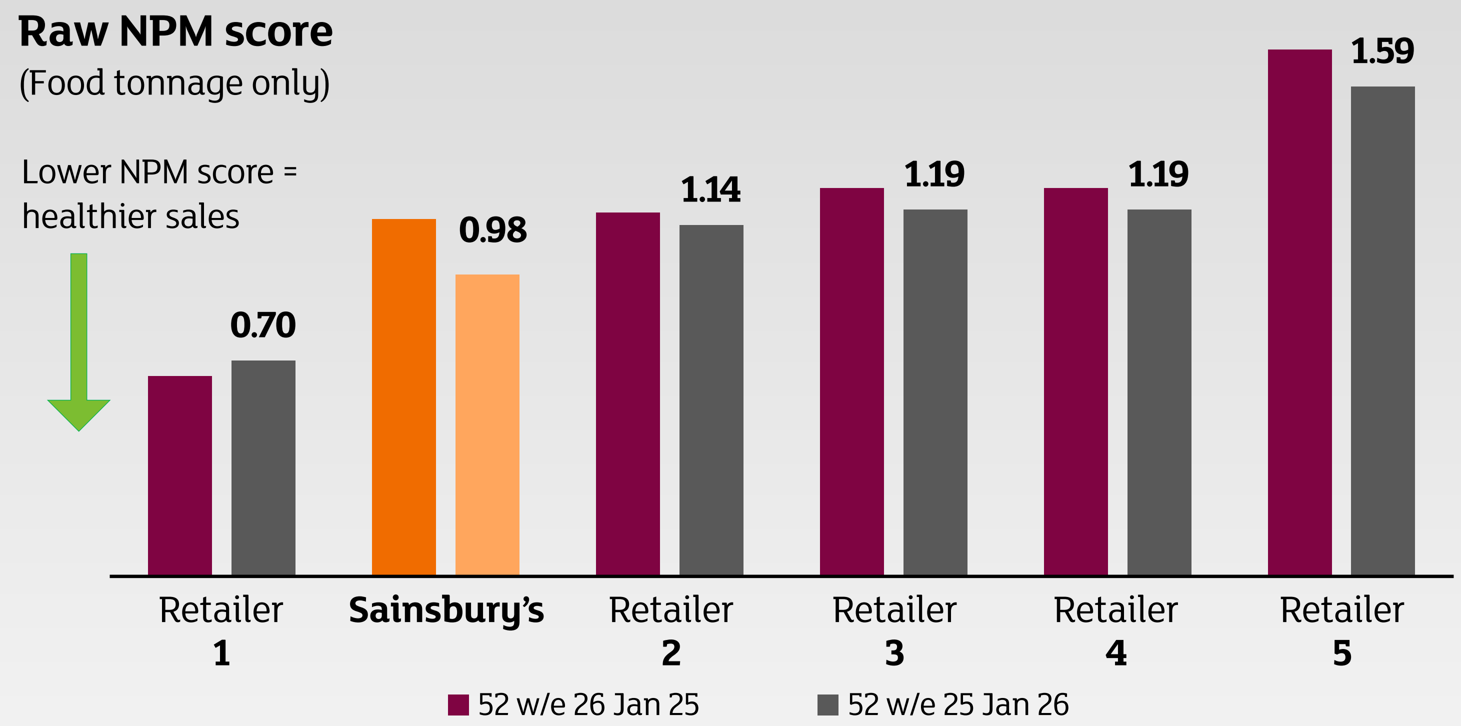
Mandatory reporting is essential to enable greater transparency of healthier sales relative to others

We're the 2nd healthiest retailer in total food volume sales and have seen the biggest improvement YoY[1]



NPM = 2004/5 Nutrient Profile Model

1. Worldpanel by Numerator - GB Take Home Food - SWA NPM scores for 52 w/e January 2026 vs 2025

Launching our

Health Strategy to 2030

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Strengthening our health commitment to 2030

Going further to make healthy eating more accessible and affordable

Growing **healthier sales**

Helping customers shift from less healthy, HFSS choices, to healthier options - without compromising on taste, value or convenience

Growing **fibre sales**

Making it easy, affordable and more joyful for customers to increase their fibre intake every day

Growing **fruit and vegetable sales**

Getting more fruit and vegetables into mealtimes across the UK - inspiring everyone to find joy in delicious fresh food

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Our work on protein diversification will continue

More sustainable protein choices

Improve animal diversity of the basket

Grow sales of healthy plant-rich choices

KEEN BEAN PLEDGER
BANG IN SOME BEANS

Committed to continued protein split disclosures

Livestock	Fish & shellfish	Plant based
77%	10%	13%

Dairy	Dairy alts.
93%	7%

2025/26 reporting. Aligned to WWF Basket methodology

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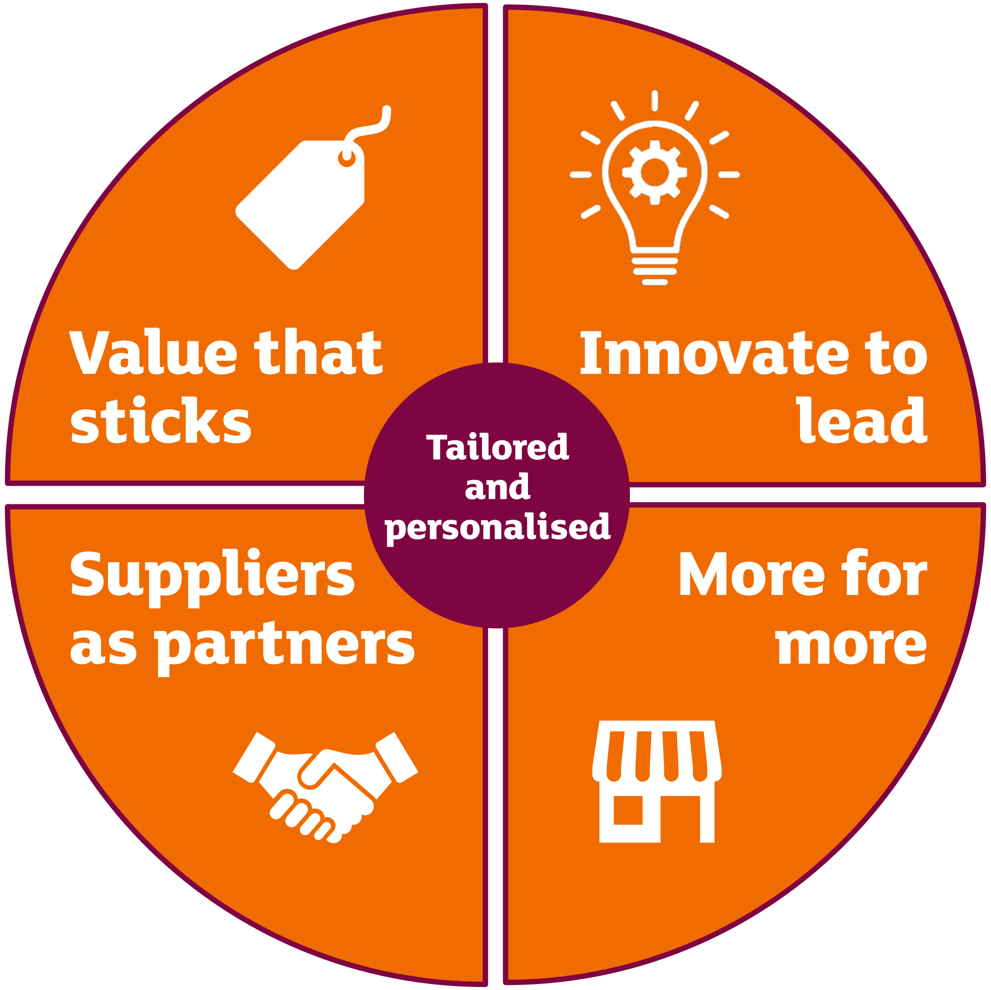
Our new health strategy is fully integrated within our plan to be First choice for food



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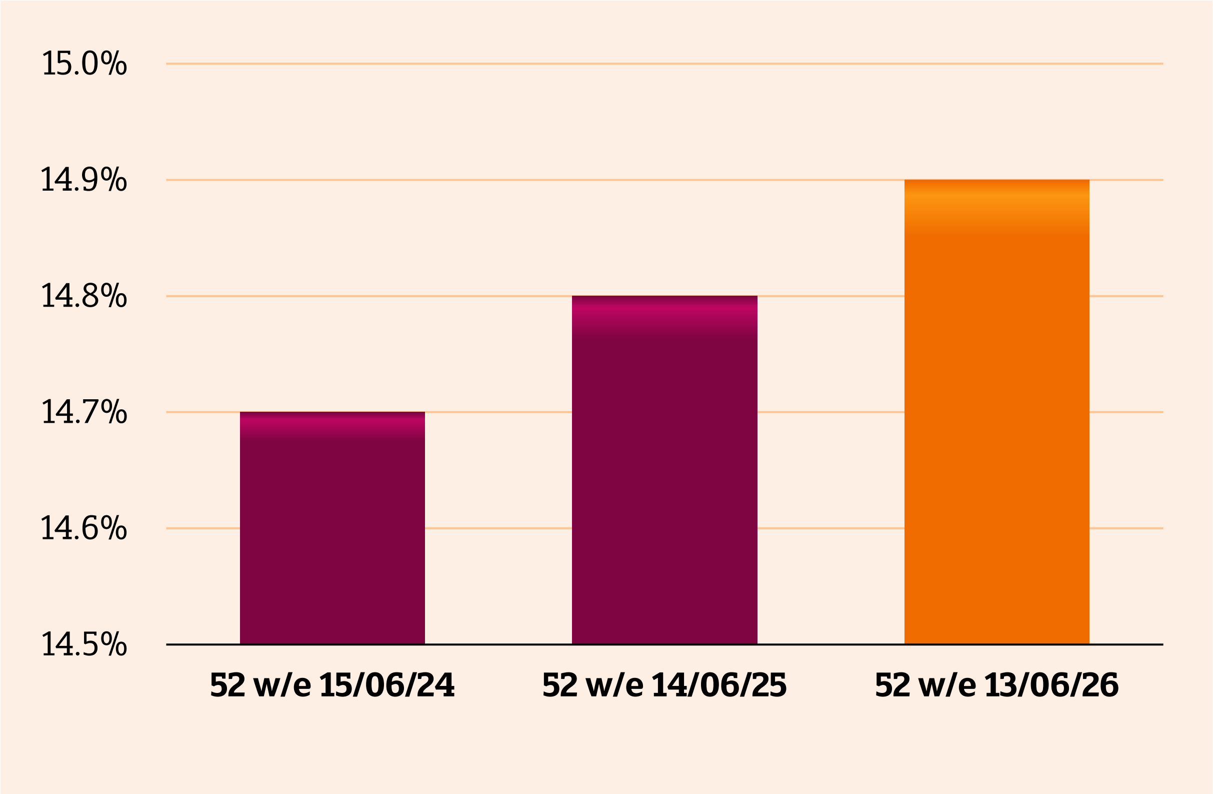
Amplifying our strengths in Fresh food, with Produce at the heart of our plan

Building on consistent outperformance vs market in produce[1]



Leveraging our strengths and opportunities

- Partnerships
- Value
- Quality
- Trade Up
- Space & Range

1. Nielsen Share of Trade Sales Units Market 52 Week to date - Produce

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Making healthy choices joyful, accessible and affordable

Full on fibre labelling on >500 products, c.100 in Aldi Price Match + Nectar Prices

Lowering NPM scores + increasing fibre through renovation, innovation and enrichment

Integrating health and value together in key marketing campaigns

Utilising personalisation and loyalty mechanics to drive healthier choices

Strengthening long-term supplier partnerships in Fresh food

Working with branded suppliers on health focused activations and events

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Annual disclosure of our progress to ensure transparency

Total food sales

Healthiness of sales

Non-HFSS (%) Total + Own Brand	NPM Score Total + Own Brand
% change vs baseline food sales	Sales-weighted score for total food sales

Specific priority areas

Fibre tonnage increase	F&V tonnage increase
% change vs baseline	% change vs baseline

Additional metrics

Animal: plant protein sales	**Dairy:** alt sales
Sales tonnage split	Sales tonnage split

Beans increase
% change vs baseline

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Strong supporters of Mandatory Reporting

Advocating for regulations to level the playing field

Website disclosures:

Tracking progress for healthy and sustainable diets

As part of Next Level Sainsbury's, we are committed to developing and delivering healthy and sustainable diets for all and meeting our Plan for Better targets. We will continue to report annually on our progress.

Health reporting area		Metric	Metric units	Status at end 2025/26	Reporting period	Baseline		2021/22	2022/23	2023/24	2024/25	2025/26
						Baseline year	Baseline					
Plan for Better target	Progress against our main Healthy and Sustainable diets target[a,b]	Healthy and Better for you sales tonnage as a proportion of total sales tonnage	%	Reported	FY	2021/22	82.0%	82.0%	81.2%	80.9%	81.9%	82.2%
Healthiness of sales	Total portfolio	Non-HFSS total sales tonnage[c]	%	Reported	FY	n/a	n/a	n/a	76.5%	76.0%	76.6%	76.9%
		Non-HFSS total sales tonnage[c]	%	Replaced	FY	n/a	n/a	75.2%	Replaced	Replaced	Replaced	Replaced
		Non-HFSS total unit sales[c]	%	Reported	FY	n/a	n/a	n/a	63.5%	62.9%	63.5%	64.2%
		Non-HFSS total unit sales[c]	%	Replaced	FY	n/a	n/a	63%	Replaced	Replaced	Replaced	Replaced
		Sales Weighted Average Nutrient Profile Model score (total)[c]	SWA	Reported	FY	n/a	n/a	n/a	n/a	n/a	n/a	1.36
		Sales Weighted Average Nutrient Profile Model score (food excluding oils)[c]	SWA	Reported	FY	n/a	n/a	n/a	n/a	n/a	n/a	2.07
		Fruit and Vegetable sales	%	Reported	FY	n/a	n/a	n/a	n/a	22%	22%	21%
		Vegetable sales[d]	%	Reported	FY	2019/20	10.2%	10.3%	10.3%	10.4%	10.5%	10.3%
	Own brand yearly health reporting	Healthy and Better for you sales	%	Reported	FY	n/a	n/a	89%	88%	87%	88%	89%
		Non-HFSS sales tonnage	%	Reported	FY	n/a	n/a	79%	79%	79%	79%	79%
		Sales Weighted Average Nutrient Profile Model score (total)[c]	SWA	Reported	FY	n/a	n/a	n/a	n/a	n/a	n/a	0.41
		Sales Weighted Average Nutrient Profile Model score (food excluding oils)[c]	SWA	Reported	FY	n/a	n/a	n/a	n/a	n/a	n/a	0.45
		Fruit and Vegetable[e]	%	Reported	FY	n/a	n/a	n/a	n/a	31%	31%	31%
Protein and dairy disclosures[f]	Protein sales (%)	Livestock	%	Reported	FY	n/a	n/a	n/a	75%	77%	77%	77%
		Fish and shellfish	%	Reported	FY	n/a	n/a	n/a	11%	10%	10%	10%
		Plant based	%	Reported	FY	n/a	n/a	n/a	14%	13%	13%	13%
	Dairy sales (%) (milk tonnage halved)	Dairy	%	Reported	FY	n/a	n/a	n/a	92%	93%	93%	93%
		Dairy alternatives	%	Reported	FY	n/a	n/a	n/a	8%	7%	7%	7%
	Keen Bean reporting (g)	Plain pulses sales tonnage (%)	%	Reported	FY	n/a	n/a	n/a	n/a	n/a	n/a	3.8%

Latest disclosures:

Started reporting progress using a sales-weighted NPM score – as total food and drink, own brand sales and also for food sales only

Sainsbury's — **NPM score 1.36** (FY 25/26) and **0.41** for own-brand only

ASDA — **NPM score 1.77** (FY 24/25)

PREMIER FOODS — **NPM score 6.78** (FY 25/26)

Useful links

- [Healthy and sustainable diets | J Sainsbury plc]
- [Plan for Better Report 2025/26 | J Sainsbury plc]
- [Performance, reports and policies | J Sainsbury plc]