

Living Labs at the point of sale

Where healthy choices meet commercial reality



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Interested? Contact us!



1. Introduction

The paradox at the point of sale: why this is an opportunity for structural change

Consumers increasingly express the desire to eat healthier. Yet in daily life, food choices are still largely shaped by convenience, price, and availability. At supermarkets, foodservice outlets, and other points of sale, the most visible, accessible, and affordable options are often those that are not aligned with healthier dietary choices.

This creates a clear paradox: while awareness and motivation are growing, the way food environments have evolved over time makes it difficult for behaviour to shift easily towards healthier choices.

At the same time, these points of sale represent one of the most powerful and still underused leverage points for change. What is offered, how it is presented, and what becomes the default option

strongly influences what ends up in shopping baskets and on our plates.

At Foodvalley, our vision is a food system in which healthy options are accessible, affordable, visible, and attractive, and where commercial incentives are aligned with public health goals. Making the healthy choice the easy choice is not simply a behavioural issue. It is a structural challenge that requires the alignment of health insights, commercial realities, and innovation capacity.

We see clear opportunities at the point of sale to further develop assortments and presentation in ways that support healthier behaviour. Not by limiting choice, but by making the healthier option the obvious, easy and commercially viable default on the shelves.

That's why we believe in a Living Labs approach: piloting a different way of working at the point of sale.

2. Why change is needed

Why the food environment overrides intention

If we want healthier behaviour at scale, interventions must focus not only on consumers, but also on the environments in which choices are made.

Research consistently shows a mismatch between what people intend to eat and what they actually buy. In the Netherlands, one in three consumers indicates they would like to eat more healthily, while almost 40% find it difficult to avoid unhealthy food. This gap is not primarily driven by a lack of knowledge or motivation.

Instead, purchasing behaviour is strongly influenced by the food environment itself. Availability, visibility, convenience and price shape choices at the moment of decision. When less healthy options are more prevalent on shelves, counters and menus, they tend to become the default. As a result, even well-intentioned consumers struggle to act in line with their health ambitions.

The urgency for change: health challenges and economic pressures keep growing

Today, around 80% of the food on offer does not align with a healthy diet, a proportion that has remained virtually unchanged over the past decade. The consequences are substantial: overweight, obesity, and nutrition-related chronic diseases, including cardiovascular disease, cancer, and type 2 diabetes, pose major public health challenges and place increasing pressure on healthcare systems.

In the Netherlands, unhealthy nutrition is estimated to account for 8.1% of the total disease burden. This translates into approximately 12,900 deaths and €6 billion in healthcare costs each year. Without structural change, these figures are expected to rise further.

Creating food environments that actively support healthier choices is therefore not only a public health priority, but also an economic necessity.

Understanding and addressing what happens at the point of sale is crucial.



3. Why change is difficult

Why good intentions and existing efforts fall short

Over the past decade, many initiatives have aimed to improve dietary behaviour. Significant research and investments have been made in product reformulation, healthier product development, food education and behavioural nudges. National policy frameworks, such as the Preventieakkoord and the National Approach to Product Improvement (NAPV), have encouraged organisations to take action.

These efforts have created a valuable foundation and increased awareness. However, they have not yet resulted in a large-scale shift in the food environment. In many product categories, reformulation reaches technical or sensory limits. Education and information campaigns, while important, prove insufficient in environments where less healthy options remain more readily available and convenient.

The real bottleneck: commercial reality at the point of sale

A key reason for limited progress lies in the commercial dynamics that shape decision-making at points of sale. Healthier products often struggle to achieve sufficient visibility, rotation and profitability. Currently, around 80% of the food offering still does not contribute to health, and this proportion has shown little improvement over the past decade.

Retailers and foodservice companies operate within tight margin structures and short evaluation periods, which often last no longer than 12 weeks to assess new products. Around 80% of newly introduced products are delisted within the first year. Even when healthier alternatives perform reasonably well, they frequently substitute existing products rather than generate incremental growth, further weakening the business case.

As a result, vendors face substantial financial risk when experimenting with healthier assortments. Without clear insight into how healthier offerings can perform commercially over time, continuing with existing assortment strategies often remains the safest commercial option. This is the area where we can really make a difference.

What is missing is not ambition or knowledge, but an approach that connects health objectives to the commercial realities of everyday food environments.



4. Our approach

Testing change where it actually happens

If healthier products are to become the default choice, they must first prove themselves within existing commercial realities. That requires moving beyond theoretical models and short-term tests, and instead learning in real-life settings with real consumers, real assortments, and real financial outcomes.

This is the starting point for Foodvalley's approach. Together with Bamboo Brands, an expert in in-store consumer behaviour research, we initiate Living Labs pilots directly at the point of sale. These pilots are designed to explore how changes in assortment composition, placement, visibility, and defaults influence both consumer behaviour and commercial performance.

By testing change where it actually happens, in retail stores and foodservice outlets, we aim to generate practical insights that help bridge the gap between health ambitions and viable business models.

Living Labs: piloting a different way of working at the point of sale

The Living Labs are deliberately set up as real-life pilots in retail and foodservice environments, where retailers and producers of healthier products collaborate in a pre-competitive setting. The interventions draw on state-of-the-art behavioural science.

The purpose of the Living Labs is not to test individual products in isolation, but to explore how healthier assortments perform as part of a broader system. Commercial, operational and behavioural insights are captured simultaneously. This includes testing changes in assortment balance, placement, visibility, pricing logic and defaults, all within the operational and commercial realities of existing outlets.

Crucially, the Living Labs are a means, not an end. They are designed to generate practical insights that can inform a different, more structural way of working

at the point of sale, rather than remaining one-off experiments. Products are given sufficient time to build consumer acceptance. Results are translated into a framework that can be adopted worldwide.

The Living Labs create the conditions for systemic change: proof that healthier products can succeed commercially and gradually take a more prominent place within assortments.

Why this approach shows promise

Food environments strongly influence purchasing behaviour. What consumers see first, what is most accessible and what is presented as the standard option all shape what people choose, often subconsciously.

By deliberately adjusting these factors, healthier choices can be made easier without restricting freedom of choice. Making healthier options more visible, better integrated into assortments and positioned as the default supports healthier behaviour while maintaining customer autonomy.

The Living Labs apply these principles in practice, allowing producers to test how such changes work in combination, and whether they can deliver both behavioural impact and commercial viability.



5. From pilots to practice

Proven in practice: building on real-world pilots

The Living Lab approach builds on two small pilots conducted in a real retail environment. These pilots provided valuable insights into how consumers respond to changes in assortment presentation, visibility and defaults when encountered in everyday shopping situations.

The pilots showed that healthier products can perform better when environmental factors are addressed systematically rather than individually. They also highlighted the importance of testing interventions over a sufficient period, allowing consumers time to adjust and new habits to form.

Our first pilot involved a collaboration with JOGG, in which a test panel of students were given the opportunity to sample healthy products. From a diverse range of bake-off products, sweets and crisps provided by partners of the Healthier Food Community, three products were selected for use in our pilots.

During the second pilot, the three selected products were sold during two periods of six weeks at the Jumbo Supermarkets store in Zetten:

- Zwamcijsje: a puff pastry roll with oyster mushroom filling, containing 32% less saturated fat compared to a traditional sausage roll
- MaGie Creations: a bread roll with a hybrid sausage made with nutrient-rich upscaled brewers grain residu, offering 3.5x more fibre than a regular option

- Food2Smile: colourful gummies free from sugar and rich in fibre, alongside crisps with 60% less fat

This pilot was conducted on a very small scale and shows that healthier alternatives can perform well when they are integrated in a visible and logical way within the existing store layout and are competitively priced.

A summary of the first results and outcomes

We were able to identify substantially healthier alternatives. On average, these products showed:

- Replacement of sauzijzenbroodje
 - 50% less saturated fat
 - 11% less salt
 - 137% more fibres
- Candy replacement
 - on average 80%-100% less sugar

These alternatives also proved to be commercially viable. They were able to replace or complement existing variants, accounting for approximately 25% of sales within the relevant product categories, while overall category sales remained stable.

Importantly, this shift did not negatively impact profitability. The healthier variants were sold at margins comparable to their conventional counterparts.

During the pilot, we temporarily increased promotional support for the healthier variants over a short period. When the promotion ended and the pilot continued as normal, sales figures remained stable.

Conclusions

While the pilot was relatively small in scale (15 products in one store) and limited in duration (two periods of six weeks), it provides an initial indication that healthier variants can be introduced without disrupting commercial performance. If a similar approach were applied to just 10% of the total retail product portfolio, even just year-round, the potential impact would be amazing, delivering meaningful health benefits for society.

These early learnings form the practical foundation for the Living Labs and demonstrate the potential of this approach, which goes beyond theoretical models or short-term tests.

We would like to explore this further and invite anyone interested in diving deeper into the results to contact us.

How the Living Labs work in practice

Each Living Lab follows a structured and transparent process. Product categories are selected based on predefined criteria, after which commitment from participating parties is secured. Suitable outlet locations and healthier product alternatives are then identified.

Together with partners of the Healthier Food Community, we have defined three product categories to start with in 2026, combining strong health with clear opportunities for commercial implementation:

- Ready to (h)eat meals
- Sweet bread toppings
- Condiments

By carefully balancing criteria such as sales volume, margin, and practical feasibility, we ultimately concluded that these product categories are the most suitable for testing, validating and scaling new approaches.

Next, a baseline measurement establishes current performance before the first validation phase is implemented in-store. Insights from this phase are evaluated and used to refine the approach in a second validation phase.

By the end of each Living Lab, partners have access to context-specific insights on pricing, placement, sales performance and margins.

Learnings are systematically captured and translated into practical frameworks that can be applied across other retail and foodservice settings, with careful attention to data governance and commercial sensitivity.

For whom is this initiative intended?

The Living Labs are designed for organisations that recognise the need to move beyond isolated interventions and are willing to test change in real-life settings. This includes:

- Retailers and foodservice operators seeking to strengthen healthier assortments without undermining commercial performance
- Producers and brands offering healthier products that struggle to gain traction at the point of sale
- Chain parties and knowledge organisations interested in practical, evidence-informed approaches to healthier food environments

The Living labs initiative is not intended as a short-term product test, but as a structured collaboration focused on learning, iteration and scalable impact.



6. Conclusion

Towards healthier products as the default choice

The ultimate ambition goes beyond running pilots. The Living Labs are designed to support a transition towards a different way of working at the point of sale, one in which healthier products are no longer the exception, but the default.

By learning together in real-life environments, retailers and suppliers can reduce risk, build confidence and take concrete steps towards food environments that support healthier choices while remaining commercially viable. This is how ambition can be translated into everyday practice on the shelf, at the counter and ultimately on the plate.

Interested? Contact us!

Are you interested in exploring what the Living Labs could mean for your organisation?

Whether you are a retailer, producer, knowledge partner or part of the wider food ecosystem, we welcome the opportunity to exchange ideas and explore potential collaboration. If you would like to learn more about the Living Labs approach or discuss how to get involved, please feel free to contact us at info@foodvalley.nl.

We look forward to continuing the conversation.