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FOODRISE
This document uses our old branding

MEAT US HALFWAY

A scorecard assessing how UK supermarkets are supporting a shift to healthy, low meat diets

FEED BACK

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EXECUTIVE SUMMARY

Our diet is the most crucial bridge between our personal choices and planetary health. Meat has become one of the most high-profile elements in an expanding public debate on sustainable and healthy life choices. Extensive literature has demonstrated that reducing meat consumption from the current UK average - Feedback suggests by half by 2030 - can not only improve public health, but also make a major contribution towards preventing irreversible damage to our natural ecosystems and climate. Reducing meat consumption is, essentially, prerequisite for ambitious action against climate change.

As an increasing number of individuals aim to reduce their meat consumption, eating more local, high quality meat, adopting flexitarian diets, or even going vegetarian or vegan, an important question arises: are supermarkets, our closest partners in feeding ourselves and our families, doing enough to help?

Supermarkets, as the companies that control British food retail, have the single biggest role to play in improving the national diet. As huge buyers from the farming sector, these corporations wield an overwhelming degree of power over their suppliers (Bowman, 2018). With this power comes a responsibility to reach into their supply chains to steer farmers towards more sustainable production and in turn to encourage customers towards healthier, more planet-friendly meals. Inadequate action from supermarkets means progress takes longer, making it harder to shift UK diets towards healthy, balanced, largely plant-based eating. This report reviews the UK's top ten supermarkets and scores them on their efforts at both the corporate and store level to support their customers in shifting to sustainable and healthy diets.

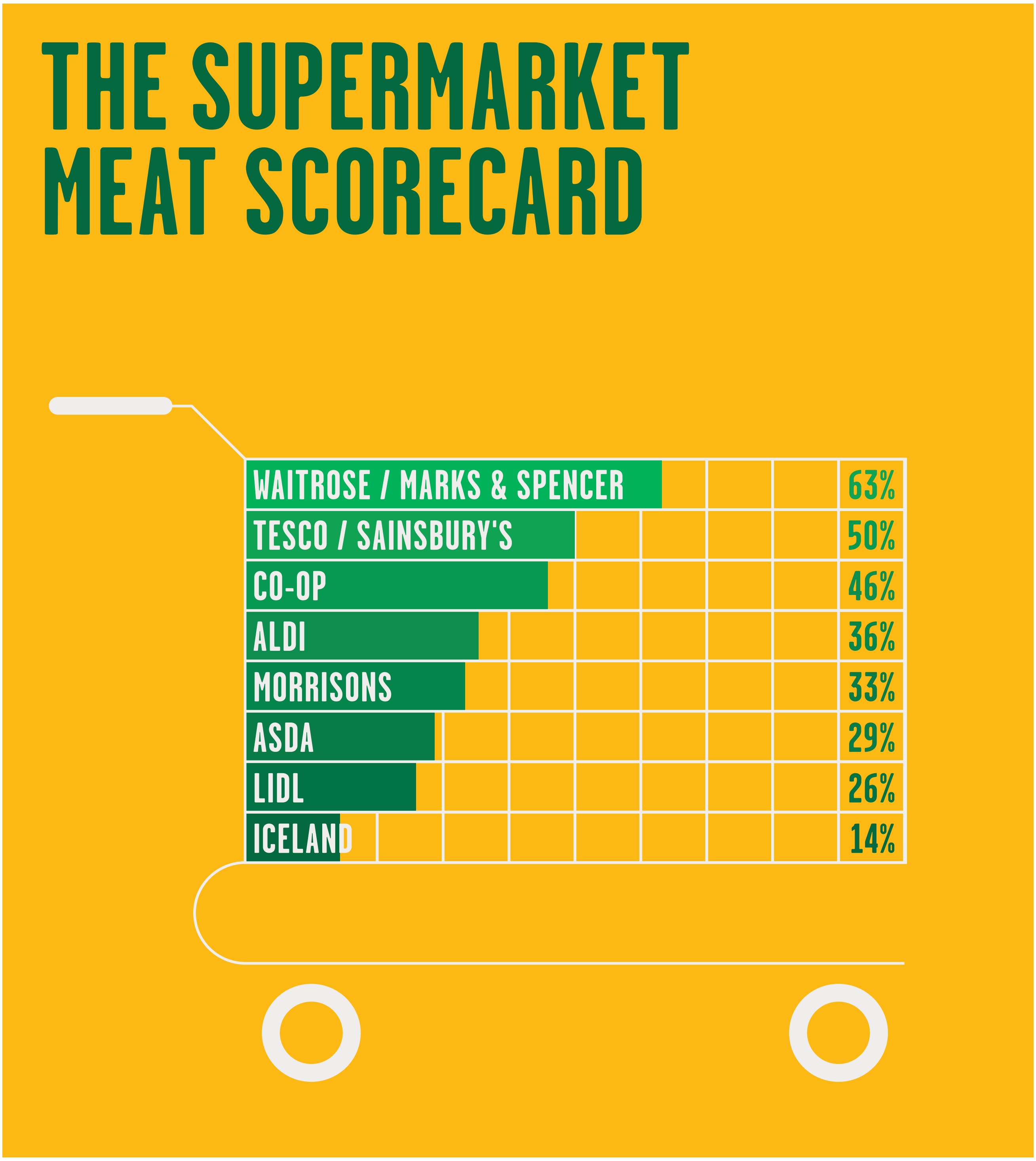
Our findings show that British supermarkets are trailing in the wake of an increasingly health-and climate-conscious public, rather than providing the leadership that is urgently needed. Feedback does not argue that meat should be entirely taken off British menu, but that it needs to be dramatically reduced and the quality improved in order to meet climate commitments. In our analysis of supermarkets, we found that whilst many are in the process of increasing their offer of plant-based proteins, most remain committed to industrially produced meat and few are publishing adequate information on their progress.

Research showed that:

- Morrisons and Iceland are laggards when it comes to having no policy on sustainable sourcing of soya for animal feed despite this crop being a direct driver of deforestation.
- Iceland are the only UK supermarket not to be a signatory of the Cerrado Manifesto, a pledge to prevent deforestation of the Amazon through land use change for agriculture in Brazil.
- Marks & Spencer (M&S) stand out for their work in improving the supply chain. They are the only retailer with a target and Key Performance Indicator (KPI) to increase their plant-based offerings.
- Many stores have expanded their vegan ranges over the last two years, but Sainsbury's and Aldi are the only retailers to place plant-based proteins in the meat section.
- Six of the top ten supermarkets sell meat that complies with no more than the minimum regulatory standards (considered in our assessment to be low-quality).

- Misleading 'fake farm' brands are still prevalent - notably in Aldi, Asda, Tesco and M&S - despite a public backlash, media mistrust and concern from the National Farmers' Union.

- Waitrose and M&S score well in our assessment as they have enacted tangible change both in their supply chains and in-store.



1. METHODOLOGY

To develop this scorecard evidence of action from the top 10 UK supermarkets was compared against a set of 22 criteria which a climate-responsible and biodiversity-friendly retailer should be addressing in relation to their meat products were they to play their part in reducing the UK's meat consumption by 50% by 2030. The analysis drew on publicly available information and data on the supermarkets' websites and in the media, as well as a number of 'mystery shopper' visits by Feedback supporters and staff to gather information on how supermarkets are moulding shoppers' experience and purchasing habits.

At the corporate level, the scorecard criteria cover policy targets related to decreasing the amount of meat on offer whilst committing to increase plant-based proteins. Responsible corporate governance in 2019 has to include transparent reporting of KPIs in relation to overall emissions - the analysis has accounted for this. A fully climate-aware retailer would consider the embodied emissions of the products they stock, technically known as 'Scope 3: Indirect Emissions' (The Carbon Trust, 2018). The analysis also looked at organisational policies on issues such as sourcing of sustainable soya for animal feed to avoid driving deforestation in supply chains. We also awarded a point to companies who have appointed an individual whose role is to champion a transition to more plant-based diets. Points are available in the scorecard for having a strong score in the Carbon Disclosure Project, an organisation monitoring company's climate performance and for signing the Ceraddo Commitment tackling destruction of the Amazon rainforest.

At the store level, supermarkets were assessed on several criteria related to their plant-based offerings and the quality of the meat they stock. Points were available for a better standards of livestock production (e.g RSPCA Assured, Free Range or Organic) and for offering cuts of meat often discarded or wasted, such as offal (Dunne, 2019). Points were awarded to retailers taking measures to prominently display plant-based proteins to increase their uptake as well as having an own-brand vegan range. Other points were granted for having a relatively high percentage of vegetarian sandwiches, ready meals and 'grab and go' salads. With regards to the quality of meat on offer, points were awarded to supermarkets for having better quality (RSCPA assured, Free Range or Organic) and to those avoiding misleading 'Fake Farm' labels.

Feedback recognises the importance of 'eating less and better' the approach advocated by the Eating Better coalition, across dairy, eggs, fish, pet food and other meat-based products that supermarkets sell. However, rather than analysing every item available related to livestock production, we have focused the in-store analysis on fresh meat and three types of convenience foods: ready meals, sandwiches and 'grab and go' salads. A further qualification is that the store-level assessment was based on supermarkets of substantial size rather than smaller stores at the convenience scale.

THE CRITERIA

At a corporate level, points were awarded to retailers for taking climate and biodiversity issues seriously by doing the following:

- Adopt a quantified target for reducing the amount of meat sold in their stores. Along with the Eating Better alliance, Feedback proposes this should be a 50% reduction in all types of meat by 2030.

- Commit to a policy on animal feed that, at a minimum, stipulates net-zero deforestation to produce animal feed. Alongside this adopt a quantified target for reducing soya demand in the supply chain to ultimately lessen the pressure to expand soya production, which is driving deforestation.

- Adopt a public commitment and quantified target to increase plant-based foods available.

- Adopt science-based climate change targets in line with scenarios that limit warming to 1.5 degrees that incorporate the climate impact of items on shelves, including meat products. This would mean the climate impact of supply chains is fully recognised in supermarket operations, including publishing indirect 'Scope 3' emissions in full when reporting emissions.

- Provide evidence of operationalisation by reporting annually on performance relative to climate targets, with specific Key Performance Indicators (KPIs).

- Appoint a senior staff member as a plant-based food 'champion' responsible for driving less and better meat through product development and marketing.

- Taking the Peas Please Pledge to boost healthy fresh fruit and vegetables as advocated by the Food Foundation.

- Publish sales data relating to the type, volume and production standards of meat sold.

- Sign up to the Cerrado Manifesto, an international commitment to improve the sustainability of the soya sector.

- Report to the Carbon Disclosure Project (CDP) and being scored well (above C) with regards to 'climate' and 'forests' categories.

In supermarket aisles, points were allocated to supermarkets demonstrating:

- An own-brand range of plant-based food: an attractive and affordable product range that makes alternative proteins appealing.

- On package guidance on sustainable and healthy meat intake in line with the EAT Lancet Commission's recommendations (Willets et al., 2019).

- Labels clearly indicate the rearing method of the meat.

- Not stocking 'fake farm' labels, which create the false impression that factory farming is wholesome.

- Meat produced at the basic regulatory standard is not sold. Free range or organic meat is offered, with RSCPA assured meat as a minimum.

- A 'nose-to-tail' approach, offering cuts from the whole animal carcass to minimise waste and reduce overall demand for amount of livestock.

BOX 1: ARE 'FAKE FARM' BRANDS TOTAL BULL?

In December 2017 Feedback launched a campaign, Total Bull, highlighting the 'biggest bull on our supermarket shelves' by spotlighting the supermarkets employing 'fake farm' names as a marketing strategy to sell their cheapest ranges of meat. Examples include Tesco's brands 'Woodside Farms' and 'Boswell Farms' and Lidl's 'Birchwood Farm'. We argued that these brands run the risk of misleading customers by using leading language and imagery to deliberately encourage consumers to believe that the meat is sourced from small-scale producers in the UK. We believe this is peddling a load of bull. Behind the bucolic mirage these brands cultivate lies the reality of large-scale, intensive livestock production, some of it outside the UK: a very different picture to the one supermarkets are seeking to cultivate. Feedback continues to call for supermarkets to reconsider these brands and the campaign has been widely reported by The Times, The Guardian and The Sun.

- Over 20% of ready meals and 'on the go' sandwiches are meat-free, and over 30% of sandwiches are meat free, based on research by Eating Better.

- Alternative proteins placed prominently in areas likely to encourage their consumption - such as in the fresh meat aisle.

Behaviour which is not currently happening and was not assessed, but should be considered, includes:

- Choice editing: Not stocking meat with the highest greenhouse gas emissions, for example grain-fed beef.

- Data collected on consumer purchase habits is in turn used to encourage and reward those purchasing alternative proteins via loyalty points and discount vouchers.

- On package meat labelling with Planetary Diet Plans, eg. 'recommended daily allowance of meat products'. This could be developed in collaboration with welfare and environmental groups and could include labelling of the environmental impact of meat, e.g. 'warning this beef/lamb has high emissions'.

- Provenance of meat in ready meals and sandwiches is clearly labelled and of better standard. For a fuller understanding of this issue, see Eating Better's reports *Sandwiches Unwrapped* and *Are Ready Meals Ready for the Future* (Alford & Corrieri, 2018; Salazar, Marchionne & Breen, 2019).

2. WHY 50% LESS MEAT BY 2030?

Intensive meat production is an environmental catastrophe. Rigorous scientific research shows that a major reduction in meat production is required to avert dangerous climate change (Springmann, 2018). The livestock sector currently accounts for 14.5% of global emissions, slightly more than emissions from all the world's vehicles (FAO, 2018). Recent research shows that the meat industry is on track to account for 60% of our global CO2e budget by 2050 (Bowles, Alexanders and Hadjikakou, 2019) and, arguably, this is dangerously generous budget, allowing just a 66% chance of global temperatures staying under 2 degrees of warming. A key aspect of cutting carbon is a change in diets with healthier and less polluting sources of protein coming to the fore (Willets et al., 2019). Based on this understanding, there is significant evidence showing that to create a trajectory that limits global warming to 1.5 degrees, which is not currently the case, there needs to be a widespread 50% reduction in meat consumption (Vivid Economics, 2018).

There are other major environmental impacts stemming from the meat industry, including deforestation, biodiversity loss, soil depletion caused by mass production of soya and the degradation of air and water quality from slurries and airborne pollution.

Aside from the environmental damage caused by meat production, there are incentives to reduce meat consumption in terms of public health, with a strong body of evidence to demonstrate the benefits to wellbeing associated with eating more plant-based diets (e.g. Scarborough et al., 2012; McEvoy, Temple & Woodside, 2012; Willets et al, 2019).

BOX 2: WHAT IS CO2E?

CO2e = Carbon dioxide equivalent. Emissions are calculated as 'CO2e' or 'Carbon Dioxide Equivalent'. This is the universal unit of measurement used to indicate the global warming potential (GWP) of each of the main Kyoto greenhouse gases in terms of Carbon Dioxide equivalent impacts. CO2e is used to evaluate the impacts of releasing (or avoiding the release of) different greenhouse gases in a consistent way. The main type of livestock emissions come from ruminating animals (most notably sheep and cattle) whose digestive systems use a process known as enteric fermentation, which produces methane. Methane is shorter lived than carbon dioxide but has a GWP 20-30 times greater.

In the UK, an increasingly topical conversation around the role of meat is underway. A recent report found that an increasing number of individuals are already or are willing to eat a 'flexitarian' diet (YouGov 2019) - a diet which includes but minimises meat - and research has shown this diet offers a straightforward way to achieve fast decarbonisation (Raphaelly and Marinova, 2013). The rise in flexitarianism, vegetarianism and veganism is motivated by concern for personal well-being, our planet and animal welfare (or any combination of the three). The success of Veganuary, with an estimated 2% of the population taking part, and the rising number of meat-free athletes are just two indicators that plant-based diets are gaining a foothold.

This report assumes that a change in all of our diets is required to reduce the significant environmental impact of the food system. Currently, far too much meat is produced in too harmful a way. Benefits to public health are significant, however our chief focus is the environmental imperative to decarbonise the food sector in light of the climate and biodiversity crisis. Central to this is a drastic reduction in livestock, particularly ruminants such as sheep and cattle, which together constitute the majority of emissions from agricultural animals (Poore and Nemecek, 2018). A helpful way of talking about this change is in terms of 'less and better' meat as advocated by Eating Better, where the quantity of meat decreases with a simultaneous increase in the quality of what remains.

3. EATING LESS AND BETTER

The amount of meat each person consumes is an individual choice, made based on cultural values, social customs and norms, as well as nutritional requirements and the ease and availability of products in the market. However, it has been suggested that a sustainable level of consumption of animal protein is around 30g per person per day (van Hal et al., 2018) although in other studies this is closer to 70g (Willets et al., 2019). Whilst commending the efforts of those choosing an entirely plant-based diet, this report is not calling for no meat on the UK's menu. In part, this is due to existing patterns of production and consumption, rendering it an unrealistic ambition in the medium term, but also due to the potential of certain livestock systems to have a regenerative impact on land and soil by converting pasture into protein via low-intensity grass-fed meat production (Fairlee, 2010). Feeding agricultural residues to all livestock and safely treated food waste to pigs are demonstrable ways in which a lower level of meat production can take place in an environmentally benign way (Luyckx & Bowman, 2018; van Hal et al., 2018). Sending food waste to animals is currently illegal under regulation introduced after the foot and mouth crisis. Feedback's campaign to safely reintroduce pig swill, The Pig Idea, aims to reduce the level of crops grown specifically for feed, and the associated land use change and deforestation challenges this poses. Until this law changes, one way in which supermarkets can contribute to reduced feed impacts is by ensuring that they send all legally permissible surplus food to animal feed, so long as it is not suitable for redistribution for human consumption (in which case, it should be redistributed to people) (O'Sullivan, 2018).

Chatham House research into social attitudes towards meat in 2015 found that, globally, public understanding of livestock's role in climate change is low relative to that for comparable sources of emissions (Wellesley et al. 2015) and changing this will require engagement which is educational and accessible to a broad audience. More recent research has shown it takes time and interventions at numerous levels to shift people's dietary habits towards reducing meat and dairy products (WRI Shift Wheel) and Eating Better's 2019 'Better By Half' roadmap recommendations.

Efforts that empower households to understand the impact of their purchases and to encourage more sustainable consumption are important. Evidence suggests that an increasing proportion of the UK public are aware of livestock's damage to the environment; polling by Eating Better shows this has risen from 31% in 2017 to 38% in 2019 (YouGov, 2019). However, approaches that focus on public awareness to improve individual decision making can only do so much within the context of an urgent need to reduce environmental impacts (Jones 2019).

Simply providing citizens with new information highlighting the connection between meat consumption and climate change is unlikely to produce the required behaviour change (Wellesley et al. 2015). For a long-lasting and systemic reduction reduction, the environmental impacts of protein alternatives versus meat need to not only be better understood but also need to be affordable, accessible, and delicious. Central to making this happen is the choice architecture that the public face when making daily decisions about what to eat; Chatham House's researchers concluded that: "Combined approaches that raise awareness of the importance of dietary change and facilitate access to alternatives, while also removing incentives for the consumption of meat and dairy products, are likely to be the most successful and most accepted options" (Wellesley et al. 2015)

4. THE KEY ROLE OF BIG RETAIL

Supermarkets, as the companies that control British food retail, have a collective responsibility to show leadership on this issue. Not only do they have sizeable reach along the supply chain to shape the methods of producers, the power supermarkets have over agricultural producers in some cases amounts to domination, most notably in terms of downwards pricing pressure in order to keep in-store offerings competitive. In the horticultural sector, this relationship has been shown to have an adverse effect on livelihood security for producers and be a driver for wastage (Bowman, 2018).

> *If Tesco had three-quarters of its aisles devoted to non-meat products, that's what we'd all be buying – and [the same applies to] adverts on the telly*
>
> *Focus group responder in research conducted by Chatham House (Wellesley et al. 2015, p.40).*

The big four supermarkets in the UK (Tesco, Sainsburys, ASDA and Morrisons) control over two thirds of the entire groceries market. When adding the remaining six to form the top ten, 95% of the value of the grocery sector is covered (Kantar Worldpanel, 2019). Whilst a consolidated market comes with issues regarding competition and the place of independents and SMEs, it also presents an opportunity; big change can occur if a small number of companies do the right thing. Furthermore, with a physical presence in every neighbourhood and over one million British people employed in supermarkets, these companies have a unique capacity to shape public demand for sustainable food.

DRIVING UP QUALITY AND STANDARDS

It is clear that the vast majority of meat currently available on the high street does not match up to best practice of production. Higher quality meat available in supermarkets constitutes standards like Free Range and certifications such as Organic; however these products make up a fraction of our nation's shopping basket; within the UK's pork sector, just 1-2% of meat produced is free range (National Pig Association, 2018) whilst the higher welfare market of chicken - including Free Range and Organic - amounts to around 4.5% of broilers (Griffiths, 2017). Moreover, confusion reigns over the meaning of standards, with the risk that meat industry norms relate to marketing terms that are neither agreed and auditable definitions of production nor widely recognised and understood by the public.

Further issues exist when it comes to the provenance of meat within processed and convenience foods, with very few retailers labelling meat on ready meals or sandwiches (Alford & Corrieri, 2018; Eating Better, 2019).

The Red Tractor label indicates UK provenance and traceability; however, its standards do not achieve higher animal welfare or environmental standards above the minimum legal requirements. Moreover, recent media reports of a poor inspection regime and the scheme's track record brings into question its reputation as a positive certification scheme (Webster, 2018; Leyland, 2018).

Supermarkets are responding to public demand for alternatives but are yet to take a lead in guiding their shoppers away from meat-based diets. Nor are they, by and large, clearly signalling to their existing meat suppliers that to achieve science-based targets they will need to switch away from high levels of meat production (The Carbon Trust, 2018). Whilst some major retailers, including M&S and Co-op, are engaging with fresh meat suppliers to drive standards up and emissions down, this remains far from the norm.

Standardised greenhouse gas reporting protocols allow retailers to report their operational emissions - Scope 1 and 2 - whilst the impact of the items on their shelves - known as Scope 3 - are considered indirect and, therefore, an area for voluntary reporting. For the true environmental impact of our food system to be captured, measured and reduced, it is crucial that emissions are addressed by retailers from the farm to the till.

5. THE SUPERMARKET MEAT SCORECARD

	TESCO	ASDA	MORRISONS	SAINSBURY'S	ALDI	CO-OP	WAITROSE	LIDL	ICELAND	M & S
CORPORATE SOCIAL RESPONSIBILITY										
Target to reduce quantity of meat sold by 50% by 2030										
Policy on sustainable animal feed*	●	●		●	●	●	●	●		●
Quantified target to increase plant-based food										●
Include CO2 of products they sell in reporting					**		**			**
Public evidence of operationalisation	●			●		●	●		●	●
Named champion***	●						●			●
Publicly available climate KPIs	●		●	●	●	●	●			●
Reporting of meat sales by type and standard						●				
Cerrado Manifesto signed	●	●	●	●	●	●	●	●		●
Peas Please signed	●	●		●	●	●	●	●		
CDP climate rating C or higher	●			●						●
CDP forest rating C or higher	●									●
Product Range										
Own-brand range of plant-based products on offer as alternatives to meat	●	●	●	●	●		●		●	●
Labels clearly refer to production methods										
On-package guidance on sustainable & healthy meat intake										
No 'fake farm' meat brands or marketing			●	●		●	●		●	
Zero non-certified meat on sale						●	●			●
RSPCA Assured meat on sale		●		●	●	●	●	●		●
Free range or organic meat on sale	●	●	●	●	●	●	●	●		●
Nose-to-tail cuts on sale			●				●			
More than 20% of ready meals vegetarian (Eating Better)							●			●
More than 20% of grab and go salads vegetarian	●	●	●	●	N/A	●	●	●	N/A	●
More than 30% of sandwiches vegetarian (Eating Better)	●		●		N/A		●	N/A	N/A	●
Plant-based protein available in meat aisle				●	●					
TOTAL POINTS AVAILABLE	24	24	24	24	22	24	24	23	22	24
TOTAL POINTS AWARDED	12	7	8	12	8	11	15	6	3	15
AS A %	50%	29%	33%	50%	36%	46%	63%	26%	14%	63%

* Defined as a commitment to zero deforestation by 2025

** Partial Scope 3 reporting. Aldi 'Third Party Logistics.' Waitrose 'Water, business travel'. M&S Strong Science-based targets

*** Job title has 'plant-based' or similar

Red denotes tokenistic offering

Yellow denotes sole action

Aldi - 36%

With plant-based burgers placed in the meat aisle, Aldi have done well to recognise an emerging market by catering for what they describe as a "growing, ethically inspired customer base, looking for delicious alternatives to meat" (Julie Ashfield of Aldi, quoted in Chiorando, 2019). It is encouraging that Aldi have stated, "We look forward to expanding our vegan offering even further over the coming months" (ibid.). In the assessment they have gained points in the corporate section for having strong climate reporting data, including partial reporting of indirect emissions. However, we marked them down for lacking a Carbon Disclosure Project rating and having no specific employee championing plant-based food. At the store level, points were gained having a plant-based range as well as for stocking some higher-quality meat. Only 9% of ready meals in 2018 were vegetarian.

ASDA - 29%

ASDA's stance on reducing and improving meat didn't fare well in the assessment. Their 'Farm Stores' label fails to accurately portray the provenance of the meat they sell and much of their stock has no more than the minimum regulatory standard. However, they did commit to driving up the sustainability of their soya supply chain in 2018 and this policy gives them a point on our scorecard. Their 'Squeaky Bean' range gains them a point in our scorecard. A concern with ASDA is their lack of concrete targets and KPIs with regards to reducing environmental impacts; their carbon footprint reporting documents are opaque and far from comprehensive. Furthermore, a lack of rating from Carbon Disclosure Project reduced their score in our assessment.

Co-op - 46%

Co-op deserve praise as the only retailer to gain a point for reporting proportions of the type and standard of the meat they sell. A further step forward in this vein would be publishing quantities with a commitment to annual reductions. Co-op gained points in the scorecard for a policy on soya and having publicly available climate KPIs. However, it missed out by having no plant-based champion employed and poor Carbon Disclosure Project ratings. In terms of the quality of their stock, they earned a point for steering clear of 'Fake Farm' branding; however they sell no organic meat and have a tokenistically small free-range offering. Points were also lost for a low proportion of vegetarian ready meals and sandwiches. Engagement along the supply-chain working via 'farming groups' holds promising potential to increase standards and their announced intention of publishing the carbon footprint of these groups would be a major breakthrough for the sector. More needs to be done for 'The Coop Way' to be hailed as leadership, though there are some signs of progress.

Iceland - 14%

Headline-grabbing successes on the issues of palm oil and plastic packaging have seen Iceland cast as the environmental hero of the high street in recent years. Yet, Iceland are one of just two stores without a policy on sustainable soya feed - an odd and significant absence considering their work on palm oil - and were the only major UK retailer not to sign the Cerrado Manifesto. Whilst a vegan range of frozen products represents a degree of progress, their fresh meat offer lacks any sort of label that goes beyond the basic regulatory minimum in terms of production methods and this loses them points in our scorecard. Considering that much of this meat is imported from industrial factory farms in Poland, the Netherlands and Denmark, these products are almost certainly reliant on soya derived from locations where rainforests are at risk. Furthermore, in-store multi-buy deals and the emphasis on value (e.g 'Lowest priced chicken in the UK' labels) encourage shoppers to consume large quantities of meat. Iceland would score better in the ranking if they reported on specific climate KPIs, engaged with Carbon Disclosure Project ratings and increased the share of vegetarian ready meals, of which, in 2018 they had just 7%, fewer than any other retailer. With the lowest marks in our scorecard, they're still a long way from 'Doing it Right'.

Lidl - 26%

With a poor showing across the board in the assessment, one of the few points that Lidl picked up was due to having a policy on sustainable soya; they are the first retailer to ensure that all of the soya in their supply chain is certified as sustainable by the Round Table on Responsible Soya. They lost out through lacking publicly available information on their climate commitments and on their progress in reducing emissions and F grades from Carbon Disclosure Project in terms of climate and forests. Commitments on animal welfare announced in 2017 are little more than descriptions of regulatory standards and fail to reassure that the store is driving up standards. Unfortunately, in-store the emphasis on cut-price meat is reflected in the quality with only tokenistic offerings of better quality meat (although they were awarded a point for this) and 'fake farm' brands 'Birchwood Farm' and 'Strathvale Farm'. They could improve by increasing the veggie ready meals on offer too.

Marks & Spencer - 63%

Through their Plan A strategy, M&S are demonstrating leadership in terms of taking climate change seriously. This translated into them scoring highest out of any store at the corporate level in our scorecard, with 8 out of 10 points achieved. M&S are the only store in our survey to gain a point for an operationalised target of increasing plant-based foods, which is included under their Plan A 'Wellbeing' commitment. However, these wins are yet to translate into publicly reporting on the type of meat they do sell or a commitment to reduce their throughput of meat. In store, M&S have gone to lengths to increase their plant-based offering, although their 'fake farm' Oakham-branded chicken is a conspicuous misstep. We very much welcome M&S' commitment to improving sustainability performance through science-based outcome measures.

Morrisons - 33%

As a 'Top 4' supermarket with a unique reach into vertically integrated supply chains, Morrisons is both producer and retailer, and therefore has the opportunity and power to drive up environmental standards in livestock production. Yet, disappointingly Morrisons picked up just two points in our corporate assessment, which were for reporting clear KPIs with regards to climate change and signing the Cerrado Manifesto. Their as-yet unreleased soya policy is notably absent. In store, points were gained for having more than 20% vegetarian sandwiches and salads, as well as a new V Taste plant-based range which included 'veggies in blankets' for Christmas 2018. We awarded them a point for their continued resistance to rebrand meat products with 'fake farm' labels. However, with the majority of their fresh meat only certified by the Farm Assured 'Red Tractor' label, Morrisons missed out on points with regard to the environmental standard of their produce. A discrepancy was noticed in our surveys too; whilst celebrating 100% British fresh meat in their marketing, pork products are sold from factory farms in Ireland and Denmark.

Sainsbury's - 50%

The Future of Food report published by Sainsbury's this year featured a promising recognition of the need for diets to move 'Beyond Meat and Fish'; this ambitious thinking is exciting and well worth encouragement. The recent pop-up 'Meat Free Butcher' is a strong signal that Sainbury's are committed to plant-based innovation. At the corporate level, Sainsbury's reporting on climate fares well in terms of transparency and performance; however it could expand on this by including the amount of meat they sell by type as well as the indirect emissions of the meat items. It also needs to improve it is Carbon Disclosure Project Forest rating, currently a D with regards to soya. In store, Sainsbury's have taken substantial steps forward in expanding their plant-based offer via the 'Love Your Veg' range and they gained points in our scorecard for placing plant protein in the meat section as well as having better quality meat on sale. There's still work to be done though; they lost a point for fewer than 20% of their ready meals being vegetarian and stocking chicken without certification has been considered a breach of a commitment made 10 years ago to transitionto higher welfare poultry (Butler, 2018). Sainsbury's have also recently been shown to stock corned beef products linked to illegal deforestation in Brazil (Illegal Deforestation Monitor, 2019). It might be one of the 'Greenest Grocers', but there's still much more to be done.

Tesco - 50%

Through their 'Wicked Kitchen' range, Tesco have championed plant-based proteins in a laudable fashion and are continuing to expand the range. They compare with their competitors favourably when it comes to the number of vegetarian and vegan sandwiches on offer. Tesco gained two points for having been awarded A by the CDP on account of strong corporate strategy on both climate and forestry. Moreover, their partnership with WWF towards reducing the environmental impact of their food is welcome and we hope to see publicly available information about whatever targets and tactics this engenders. However, we are concerned that their continued use of 'fake farm' labels sends the wrong messages to customers. Quite frankly, their labels are misleading. Tesco's fresh meat selection contains items produced to lowest legal regulatory standards via intensive industrial production. While every little bit helps, it's clear there is huge room for Tesco to improve.

Waitrose - 63%

Waitrose scored well in our assessment in part for having a product developer working on vegetarian and vegan products. There's evidence of Waitrose engaging their livestock suppliers to increase standards in livestock feed and reduce emissions through its agronomy group. Evidence of operationalizing change and clear KPIs are publicly available, and there is partial inclusion of 'indirect' emissions too. Other points were won for having a high proportion of vegetarian ready meals, sandwiches and salads, as well as better quality fresh meat available.

A NOTE ON FARMING

Despite an ambitious target from National Farmers Union (NFU) for a net zero carbon agricultural sector by 2040, the approach from the UK's largest agricultural body fails to acknowledge the need for substantial reductions in livestock. This need is not about blaming any single specific type of farming for the agricultural economics that have led to producers having to 'get big or get out' and intensify their production, nor are we attempting to undermine the security of livelihoods. However, cheap mass-produced meat has an environmental cost that needs to be factored in and where this is CO_2 heavy, the farmer needs encouragement and assistance to change or diversify their key products. One viable way of making this happen is via a Protein Aid Scheme to encourage farmers to cultivate protein-based crops (New Economics Foundation, 2017). When a Protein Aid Scheme was introduced in Ireland in 2015, it led to a 300% increase in the amount of protein grown in just the first year (Ibid.). A second policy option we support is to increase rewards to farmers capturing and storing carbon, which should be prioritised as a 'public good' worthy of public money (DEFRA, 2018). However, these changes cannot occur unless there is an open acknowledgement on the part of the agricultural sector that less meat production is required.

Feedback's message to the farming sector is first and foremost to acknowledge the existing overproduction of animal-based foods with regard to the NFU's net zero commitment by 2040. Second, to take further steps to ensure meat waste is avoided at every stage of the supply chain. Third, beef and lamb production should be reduced, particularly livestock which is fed on imported grain. In doing so, Feedback calls for an improvement in the rearing techniques of livestock to reduce CO_2e and for land being used for grazing animals to maximise its carbon storage potential (e.g. more hedges and trees). Feedback is supportive of efforts to reduce the CO_2 intensity of livestock production (e.g. Farm Carbon Cutting Toolkit and Cool Farm Alliance) but also caution that an efficiency-based approach should come second to a focus on reducing meat; efficiency can lead to intensification. Whilst intensive livestock farming can provide preferable input to protein ratios than systems such as organic or free range, this is at risk of gains from efficiency being lost by the impact of industrial feed production and poor waste management (Rodker et al., 2019). Factory farming may be efficient, but it is geared towards mass production and, therefore, overproduction.

> *It's important to realise – that because methane emissions have a direct relationship with feed eaten – that the only livestock solution at present is to reduce production.*
>
> Sam McIvor, CEO of Beef and Lamb New Zealand in 2019.

6. CONCLUSION

This research shows that the UK's groceries high street has a long way to go in meeting the urgent environmental need for less and better meat. Nonetheless, the wind is blowing in the right direction; the public are keen for better plant-based options and it is time for supermarkets to harness this potential and steer the UK's diet towards a future that is far less reliant on meat. For the quantity of meat to be halved by 2030, a substantial level of investment is required in terms of product development and marketing on the part of the retail sector, as well as quantified and transparent targets to be set by companies, with publicly reported KPIs. This is not just about putting more plant-based products on shelves but signaling along the supply-chain that beef and lamb must play a much smaller role in responsible, future-friendly diets. responsible, climate-friendly diet.

It is important to recognise that the laggards in our assessment are primarily the retailers who compete most keenly on price point. Feedback is committed to the principle that all people have secure access to affordable and healthy food. We also believe it is important that food prices reflect the costs of production, so that farmers and producers are ensured a fair income. Both of these outcomes add value to society and to the environment in a way that corporate and shareholder profit does not. We do not accept that offering good value food is a barrier to raising standards.

There are simultaneous gains to be won from the reduced meat agenda, not least in terms of public health. And whilst there are likely to be losers that need to be realistically considered and accommodated, such as industrial livestock producers, the switch to less meat presents a positive opportunity for public health, biodiversity and achieving the UK's net zero targets.

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