

GREENWASH GROCERS

How UK supermarkets are greenwashing their climate impact
by ignoring meat and dairy emissions



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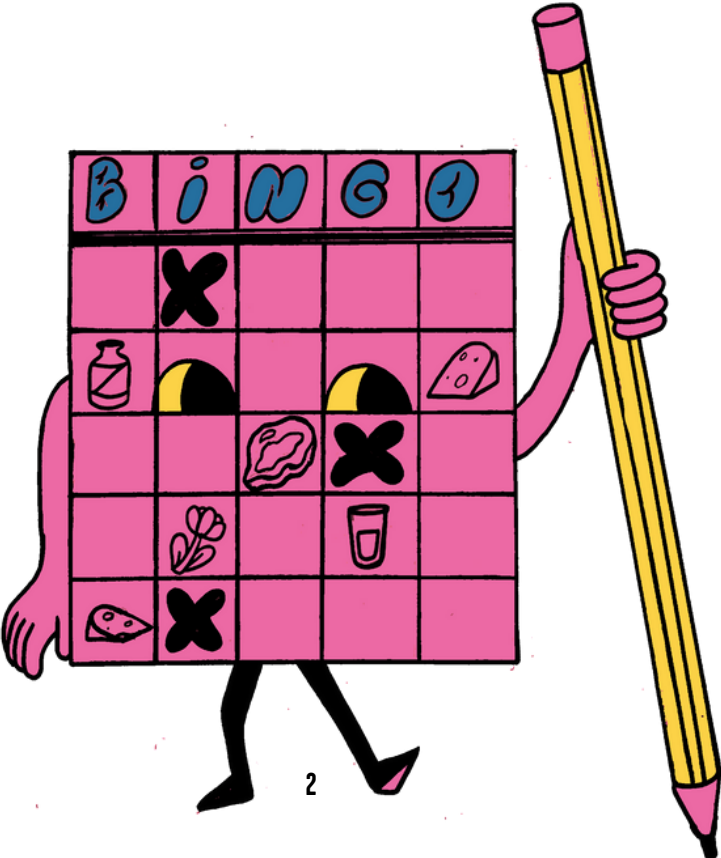
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INTRODUCTION



SUMMARY

Feedback's Supermarket Meat and Climate Scorecard Report 2023 finds that greenwash is rife across the UK supermarket sector, and exposes the ways in which the 10 largest supermarkets are 'greenwashing' their climate footprint.

With growing public awareness of the urgent need to halt global heating, UK supermarkets have been quick to adopt climate-friendly marketing, with new 'green' packaging, climate targets and advertising campaigns. But so far, no UK supermarket has set targets to reduce sales of meat and dairy, despite the fact that these high-polluting products are responsible for around a third of their overall emissions.[1]

Our Scorecard showcases how supermarkets are continuing to drive the UK's overconsumption of meat and dairy, whilst using a variety of greenwashing tactics to distract, hide, and mislead their customers on their climate action. These tactics include: 'selective disclosure',[2] where companies disclose on some elements of their climate or environmental impact, such as emissions from stores and vehicles (Scope 1&2), while avoiding talking about more harmful issues such as the 95% of emissions which comes from sales (Scope 3); distraction techniques where companies shine a spotlight on specific, often ultimately less effective, environmental initiatives; unproven 'future fixes' to their emissions problem, when they could reduce emissions in the here and now.

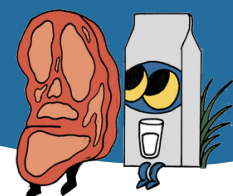
If we're to meet critical climate targets and create a food system that feeds people without harming the planet, it is vital that supermarkets start taking responsibility as key players in the food system through real action to reduce their emissions. Feedback is calling for retailers to provide honest reporting of Scopes 1, 2 and 3 emissions, create a real action plan for how they will meet climate targets, and stop promoting meat and dairy.

WHAT ARE SCOPE 1, 2 & 3 EMISSIONS?

Scope 1: Direct emissions from sources that an organisation owns or controls, e.g. burning fuel in vehicles or heating stores.

Scope 2: Indirect emissions that a company causes from the purchase and use of electricity, steam, heating and cooling, e.g. generating the electricity used in buildings.

Scope 3: All other emissions that occur in the activities of an organisation, not produced by the supermarket itself, but by those that it's indirectly responsible for up and down its value chain. For example, purchased goods and services, use of sold products.



KEY RECOMMENDATIONS

Feedback is calling for retailers to reality check their climate plans and take action to reduce the climate impact of their meat and dairy sales by:

➤ **Adopting true transparency**

Current climate reporting is misleading. Retailers frequently report detailed emissions data for their sales behind the closed doors of industry roundtables or initiatives, and fail to make public the scale of their emissions from meat and dairy products. This transparency is vital in making the transition away from diets high in animal source foods and towards healthy and sustainable diets.

➤ **Pathways to net zero**

While most retailers have adopted some kind of 'Net Zero' target (i.e. a commitment to reduce their emissions in line with climate science), none have made public exactly how they plan to meet these targets. With meat and dairy representing a third or more of retailers' emissions,[1] they must make an explicit action plan for how to reduce these - by selling less of these products, and more of healthy wholefoods like pulses, grains, vegetables and fruit.

➤ **Drop promotions on meat and dairy**

One obvious and easy way supermarkets can take immediate action to reduce their emissions from meat and dairy sales is to drop all promotions on these products. In July 2023, several supermarkets dropped multibuy on unhealthy products,[3] showing that real action is possible to change food environments for the better. Now some of the same steps must be taken for meat and dairy. Alongside this, supermarkets should promote healthy wholefood options like grains, pulses, vegetables and fruits.

Greenwashing is the making of “deceptive or outright false environmental claims”, which can be used to “to promote the organisation’s status, while avoiding making changes necessary to rapidly reduce negative impacts on the environment”. [2]



WHY MEAT AND DAIRY?

Global food production represents about 30% of the world's GHG emissions.[4] Serious action to solve the climate crisis means transforming what we eat, urgently. The UK government's advisors, The Climate Change Committee, recommend a 50% reduction in all meat and dairy by 2050.[5]

- Livestock production is a leading cause of climate and ecological breakdown. If current growth trends continue, the animal agriculture sector will take up almost half (49%) of the world's entire carbon emissions budget by 2030.[6] The UK's overconsumption of meat and dairy is also driving biodiversity loss and ecosystem destruction: land cleared for the grazing of animals and soya imported from South America, 90% of which is fed to livestock (particularly chickens and pigs), is directly linked with deforestation in the Amazon Cerrado.[7] Even ignoring the slew of other environmental consequences, such as biodiversity loss, water use, air and water pollution, and soil acidification, [8] even the least carbon intensive beef is more polluting than plant protein options.[9]
- Meat and dairy reduction is a low-risk, high-reward victory for the climate. Whilst other decarbonisation challenges for the UK depend on major infrastructural changes and investment — such as renewable energy transition, vehicle electrification — reducing meat and dairy consumption does not. As we lay out, food retailers' first step should be to halt policies currently in place which actively promote meat and dairy sales.
- As an industrialised country, the UK consumes more than our fair share of global meat and dairy consumption. Alongside other measures, such as halving food waste, reducing this consumption could deliver a fifth of emissions mitigation needed globally to stay within the Paris Agreement's global warming limit of 2°C.[10] The Committee on Climate Change reports that a 20% reduction in the most carbon intensive foods (i.e. beef, lamb and dairy) would have the largest impact on addressing climate change impacts of all their food system recommendations.
- The benefits could be felt much more quickly than decarbonisation in other areas of the economy. According to the UN, reductions in methane — a potent greenhouse gas — could deliver near-term emission reductions needed to begin to get the climate on track. As animal agriculture is a leading source of methane (around 27% globally),[11] dietary transition would have a significant and immediate contribution towards our Net Zero goals.

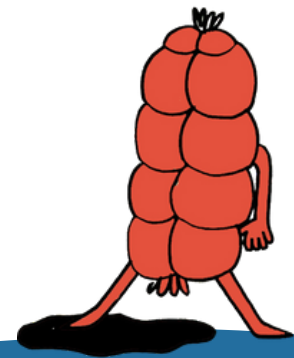
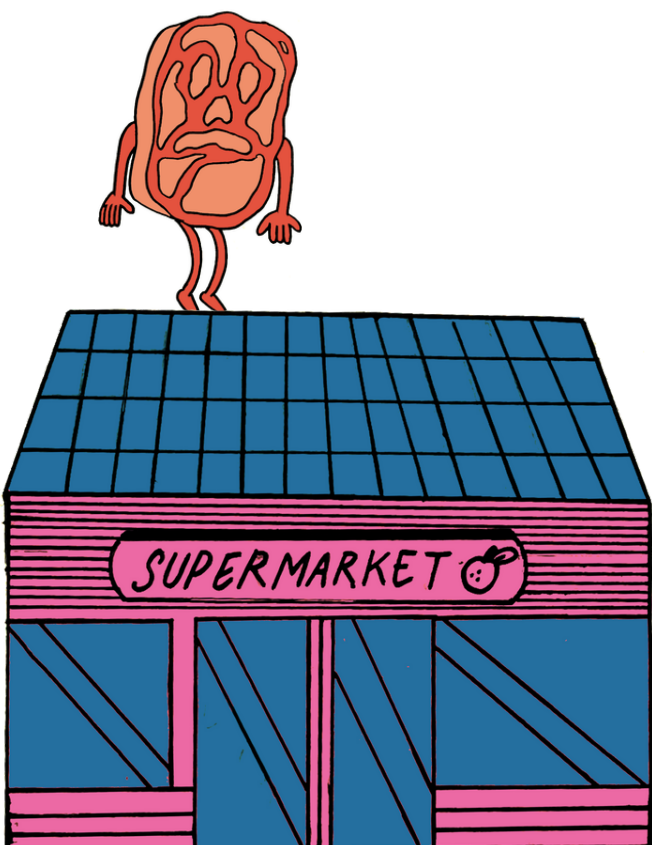


WHY SUPERMARKETS?

Supermarkets have a huge amount of power within the UK food system: deciding what suppliers can sell, which products to stock, market, and how to price, package, and promote them. This places them in a unique position to influence widespread changes to the way we produce and consume food in the UK, which are necessary to reduce our impact on the planet.

As a result of this power and influence, supermarkets have a responsibility to encourage a shift away from the current overconsumption of meat and dairy and towards more sustainable diets. Currently, however, most supermarkets are failing to take this responsibility seriously: none of the supermarkets we assessed have targets to reduce their meat and dairy sales, and only 9% of all UK supermarket protein sales are plant-based. [12]

Supermarkets' own data indicates that sales of fresh meat, fish and dairy alone constitute around a third or more of their total emissions. [1] To meet their own public commitments on climate change, including Net Zero targets, they will need to radically reduce these emissions.



Supermarkets create and shape 'food environments', the myriad of influences on what and how we eat. Their decisions on which products to stock, market, and how to price, package, and promote them hold massive influence over what eventually ends up in baskets, on tables, and in our bodies.

HOW WE SCORED THE SUPERMARKETS

Using publicly available information and store visits, the Scorecard assesses the UK's top 10 food retailers across 12 indicators, to create a unique 'greenwash profile' for each. The indicators are divided between three categories, covering their data disclosure, marketing gimmicks, and in-store practices on meat and dairy retail. Full indicators in the appendix.

HIDE & IGNORE

This category assesses retailers on 'selective disclosure', and whether they align their policies with their actions.

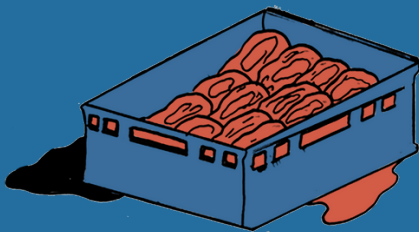
These indicators show what supermarkets aren't reporting, so they can avoid addressing the real issues. By not reporting the key data or avoiding discussion of the role of meat and dairy in the climate crisis, retailers are failing to align their policies with their stated goals and values.



DISTRACT & PRETEND

This category assesses whether retailers' are using environmental claims on meat and dairy which are not credible, or promoting distracting environmental solutions.

Here we point out retailers' distraction tactics. Supermarkets are pointing to insignificant initiatives and relying on dodgy tech fixes to distract the public and pretend that they're taking real action on the climate crisis.



PROMOTE & PROFIT

This category assesses how retailers are creating food environments that promote meat and dairy products, profiting from an industry they know is harmful.

Here we show the ways that retailers drive sales of meat and dairy in their stores and online, from their recipes to their aisle end displays and prominent marketing.



THE INDICATORS

The indicators are based on academic research on common greenwashing practices by major businesses, and Feedback’s experience assessing retailers’ progress on the climate impact of their meat and dairy sales since 2019.

HIDE AND IGNORE	Failing to publish up to date Scope 3 emissions data
	Retailer does not have a regular reporting schedule for Scope 3 emissions
	Failing to publish meat and dairy sales data
	Retailer has not published the % of their Scope emissions caused by meat and dairy products.
	Failing to publish protein split
	Retailer has not published the ratio of their protein sales that are derived from plant and animal proteins.
Not talking about the role of meat and dairy in the climate crisis	
	Retailer has not formally recognised the impact of meat and dairy in the climate crisis.

DISTRACT AND PRETEND	Relying on unproven tech fixes to reduce GHG emissions from meat and dairy
	Retailer's Net Zero targets are planned around dubious carbon intensity reduction programs.
	Targets to increase plant-based sales without reducing meat sales
	Retailer is expanding its plant-based ranges, but has not provided evidence of reduction in meat and dairy sales.
	Overmarketing of Scope 1 and 2 reduction initiatives
	Retailer uses public-facing marketing, such as website space, in-store advertising, and delivery vehicles, to promote Scope 1 and 2 emission reductions.
	Focus on small product/packaging initiatives
Retailer markets Scope 3 reduction initiatives which are minimal compared to its unchecked meat and dairy emissions.	

PROMOTE AND PROFIT

Prominent positioning of meat and dairy in-stores

Retailer uses visible promotional spaces, such as those on 'end-of-aisle', or equivalent, to promote meat and dairy products.

Multibuys, Two-for-One Deals on meat and dairy

Retailer offers multibuy deals on its meat and dairy products.

Higher proportion of recipe suggestions for meat and dairy than vegetarian or vegan

Retailer recipes direct consumers to buy meat and dairy ingredients more than half the time, based on its 100 top recipes.

Prominent instore advertising of meat and dairy products

Retailer uses on-site and online advertising spaces to promote meat and dairy products (e.g. in-store and storefront billboards, online banner ads, homepage meat multibuys).



KEY FINDINGS

WHAT DID WE FIND? RAMPANT GREENWASHING!

Our research shows that all 10 UK supermarkets are failing to take basic measures to address their sales of meat and dairy products, despite these products making up around a third of their carbon footprint.

In spite of this failure, all are marketing sustainability credentials as part of their corporate identity, giving the public a false impression that they are helping, not hindering, in the climate crisis.

The reality is that by continuing to over-sell meat and dairy, the supermarkets are fuelling the UK's contribution to the climate crisis.

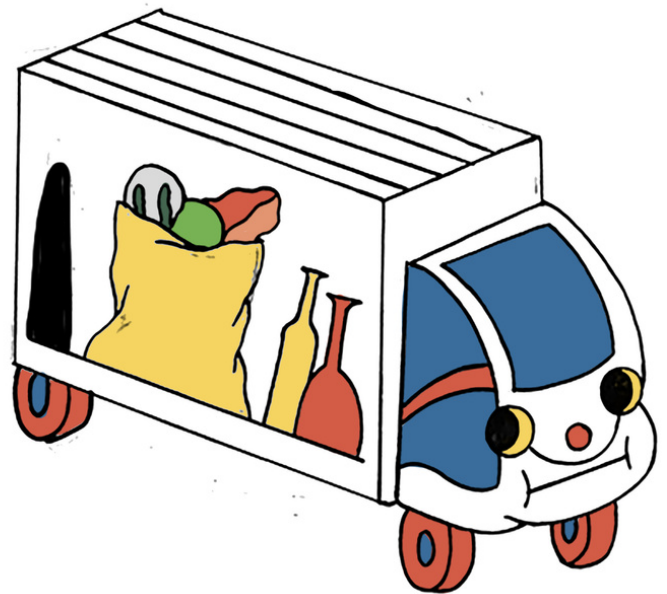


EVERY LITTLE HURTS

Most frequently, we encountered ‘Selective Disclosure’ – environmental claims based on narrow or irrelevant information, intended to distract shoppers from the supermarket’s wider, and more significant, environmental impact.[2] We found that many supermarkets build their image around small initiatives, such as electrification of their home delivery vehicles and refrigeration upgrades, which contribute negligible savings to their massive greenhouse gas bills.

As an example, Aldi’s sustainability information headlines the claim that “Aldi UK and Ireland have been Carbon Neutral since January 2019”. [13] However, this claim is a reference to Scope 1 and 2 emissions only, ignoring the 99.33% of its emissions footprint that comes from Scope 3. [14] Making this claim to appear ‘sustainable’, without providing the essential context needed to understand it, is ‘selective disclosure’, a form of greenwashing.

Tesco promotes its electric delivery vehicles, using their visibility on the road to market the company’s green credentials, including the slogan ‘Greener Greens’. However, while they have predicted these vans to save ‘82,000 tonnes of carbon per year’ by 2028 [15] (since pushed back to 2030), [16] this represents only 0.1% of the company’s overall emissions this year. [16] Initiatives like electric vans amount to little more than greenwash and gimmicks if they aren’t paired with a real plan to tackle the 24.8 million tonnes of CO₂e estimated to result from Tesco’s continued and reckless sales of meat and dairy.



DODGY TECH FIXES

Where food retailers have recognised the need to reduce emissions from meat and dairy, they are delaying reduction targets in favour of unproven technological fixes in their supply chain. For example, Morrisons' Net Zero policy is based on 'blueprint beef farms', window-dressing projects with no proof of output or scalability. [17] Their flagship farm, for example, hosts only 160 breeding beef cows, and is not itself carbon neutral. [17] Moreover, its plans to reach carbon neutrality depend on a combination of dubious intensity-reduction schemes and deeply problematic offsetting. [18]

Emissions intensity reduction schemes promise that minor alterations, such as feed changes and selective breeding, will make industrial beef farming sustainable. The problem is that reducing the emissions intensity of a product doesn't help the climate if absolute emissions continue to rise.

These unproven tech fixes allow supermarkets like Morrisons to continue their destructive practices selling huge volumes of industrial meat, whilst passing off reduced-carbon meat as a future fix. Without making reduction of meat and dairy central to their plans, this amounts to a delay tactic, allowing supermarkets and other industry actors to falsely reassure their customers and greenwash their image.

To contextualise the seriousness of this problem, in June 2023 the Climate Change Committee identified overdependence on unproven technologies in agriculture as a barrier to the UK's Net Zero strategy. [19] Industry promotion of technologies "in development", [19] alongside opposition to dietary transition, is not just a greenwashing strategy for individual supermarkets like Morrisons – it is a serious risk to national climate targets.



MORE PLANT-BASED, NOT LESS MEAT AND DAIRY

WWF found that only 9% of supermarkets' current protein sales are plant-based: 91% come from animal sources. [12] An increase in sales of plant-based alternatives (such as alternative proteins) alone cannot facilitate dietary transition, which by definition requires a corresponding decrease in consumption of animal products.

Unfortunately, Feedback found that supermarkets are promoting new ranges of plant-based products, without reducing meat and dairy product sales. Whilst all 10 promote a plant-based range, no supermarket has a target or plan to reduce its overall sales of meat and dairy products. This additional effort is required: research from The University of Surrey has shown that increased sales of plant-based products do not correspond to reduced sales of meat products. [20]

Supermarkets are exploiting a new market opportunity under the guise of “incentivis[ing]... customers to make more sustainable choices”. [21] This is evidently not progress towards climate goals; in the absence of reporting real data and setting real targets, it is greenwashing.



WINDOW DRESSING

Where products on the shelves are concerned, retailers are pursuing minor alterations to packaging to present them as more environmentally friendly, without any acknowledgement of the far greater environmental impact of the product the packaging contains. 7/10 retailers sold meat and dairy products featuring environmental claims about packaging, falsely reassuring shoppers that these products are 'green'. For example, Aldi, ASDA, M&S, and Sainsburys sell beef steaks which feature labels celebrating recyclable or plastic-free trays, whilst vacuum-packed mince has made its way onto shelves in Sainsburys, Co-op, and Lidl.

Whilst plastic reduction is an important part of a comprehensive environmental strategy, the promotion of these initiatives is being actively co-opted to undermine essential climate action. On a product level, these window-dressing efforts "try to make the public feel 'green'"[2] about environmentally harmful products, amounting to greenwash. Whilst supermarkets argue that plastic reduction is more important to their customers than dietary change, they are deliberately ignoring the role their messaging plays in shaping those priorities. Ultimately, it is easier for retailers to help their customers feel 'green' with small plastic reduction, than to confront the reality that their sales of meat and dairy are actively driving the climate crisis.



BUY ONE GET TWO DEGREES

UK food retailers continue to undermine their climate commitments by filling traditional advertising spaces with meat and dairy products, offering multibuy deals on these products, and even publishing online recipes that direct customers to buy more meat and dairy in-store.

By doing this, supermarkets are inducing demand for meat and dairy with policies that shape 'food environments'. Of their top 100 recipes, an average 78% of a supermarket's online recipes encourage meat and/or dairy purchases. Morrisons is worst offender with 86%. To add to this, 8/10 retailers were offering multibuy deals on meat and dairy products during Feedback's store visits, and all ten utilise prominent promotional spaces in their stores and website for meat and dairy products.

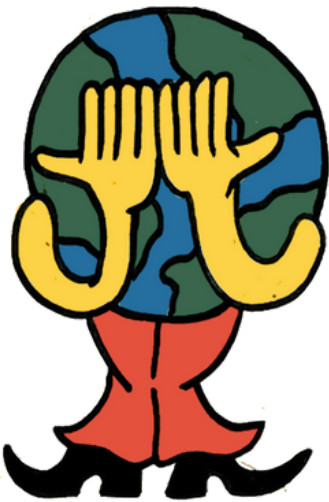
Whilst supermarkets make the case that they support free choice, or a desire to guide more sustainable diets in their corporate materials, they bombard their customers with meat-driven messaging and profiteer from the most destructive products. Their actions just aren't aligned with their talk.



THE REPORTING PROBLEM

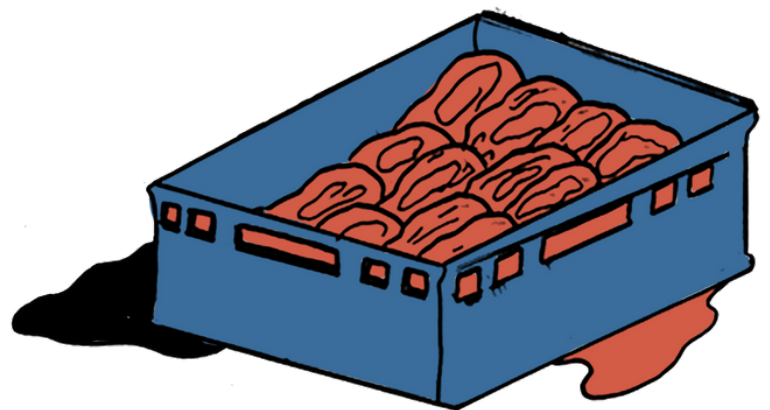
When comparing available information from retailers, emissions data reporting in the sector was found to be chaotic and inadequate. No supermarket publishes regular data on its meat and dairy sales, by quantity or emissions. Only Lidl and Sainsbury's have published Scope 3 breakdowns by product and these figures have not been updated since 2020; Iceland do not have a regular reporting schedule; and Morrisons and Waitrose have yet to publish Scope 3 data at all.

Without the ability to reliably track and compare supermarkets' emissions data, nor even to see the proportions of this coming from meat and dairy, it is impossible to track their progress towards goals or general ambitions.



THE COW IN THE ROOM

Supermarkets' messaging is largely out of touch with scientific evidence on the role that diets high in meat and dairy, and in particular industrially produced meat and dairy, play in driving climate breakdown. Only Waitrose and M&S have made clear written company statements recognising the need for dietary transition away from meat and dairy. Others allude to this conclusion, but UK supermarkets need to be unambiguous in their messaging and clear in their ambitions.





GREEN CROSS? GREENWASHING!



HIDE & IGNORE	Unpublished Scope 3 Data	Unpublished Protein Split	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Scope 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
	Prominent Positioning of Meat & Dairy	Meat & Dairy Multibuys	Meaty Meat Inspiration	Prominent Meat & Dairy Advertising

"We've been leading on sustainability for two decades."

Despite claiming to lead the sector, Tesco is failing to even lead on its own promises. Promising it will be Net Zero by 2050, the retailer has yet to make a commitment to cutting sales of animal source foods. With meat, fish and dairy sales contributing 24.8 million tonnes CO₂e a year [Note A] — around the same as the carbon footprint for the whole of Northern Ireland [22] — Tesco have a duty to do better.

As the largest food retailer by far, they have the capacity to record their data, but share only limited information publicly, making public accountability to their goals impossible.

To hide these failings, Tesco markets heavily its smaller climate and environment initiatives, such as its 'Greener Greens' electric delivery vans (which at best will only create emissions savings equivalent to around 0.1% of its footprint). All the while, it is yet to make a clear public statement about meat and dairy, let alone a detailed plan for how to reduce sales of these products.

Sainsbury's

HIDE & IGNORE	Unpublished Scope 3 Data	Unpublished Protein Split	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
DISTRACT & PRETEND	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Scope 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
PROMOTE & PROFIT	Prominent Positioning of Meat & Dairy	Meat & Dairy Multibuy	Meaty Meal Inspiration	Prominent Meat & Dairy Advertising

"Better for the planet"

Sainsbury's recognise the material risks that the climate crisis will have on their business, and the importance of health and sustainable diets. [23] However, they continue to overpromote the consumption of meat and dairy products by investing in branding and marketing, such as their new 'value range', *Stamford Street Co*, which at the time of publication contains more than 44 meat, fish and dairy products and only 12 fruit and veg products. [24]

Sainsbury's carbon emissions webpage mentions LED lightbulbs as a 'key achievement'. [25] Meanwhile, they won't get a handle on their Scope 3 emissions, passing the buck to their suppliers. [26]

Like Tesco, Sainsbury's have the capacity to commission and record data, yet share the same unwillingness to be held accountable by it. Whilst they have published Scope 3 data and meat and dairy sales data in the past, their reporting remains highly irregular.



<p>HIDE & IGNORE</p> <p>DISTRACT & PRETEND</p> <p>PROMOTE & PROFIT</p>	<p>Unpublished Scope 3 Data</p>	<p>Unpublished Protein Split</p>	<p>No Meat and Dairy Sales Figures</p>	<p>No Statement on Meat and Dairy's Impact</p>
	<p>Dodgy Tech Fixes</p>	<p>More Plant-Based, Not Less Meat & Dairy</p>	<p>Overpromotion of Minor Scope 1 & 2 Initiatives</p>	<p>Using Packaging Gimmicks to Sell Meat & Dairy</p>
	<p>Prominent Positioning of Meat & Dairy</p>	<p>Meat & Dairy Multibuys</p>	<p>Meaty Meal Inspiration</p>	<p>Prominent Meat & Dairy Advertising</p>

"We aim to protect and conserve the world around us through sustainable practices and initiatives"

For ASDA shoppers, stores are stacked with meat multibuys, advertising, meaty meal ideas, and prominent placement of the most environmentally-damaging products. ASDA's experimentation with 'more sustainable choices' [27] is overshadowed by the practices it continues to employ to sell more meat and dairy.

Whilst introducing new plant-based products, ASDA have made clear that dietary transition is not their goal, as they are still introducing dozens of new meat, fish, and poultry lines. [28] They are happy to profit from the 'vegan diets' market opportunity, but not to accept responsibility for shifting the average diet.

ASDA recently published its total carbon footprint, including its overall Scope 3 figure. Unfortunately, just holding the emissions data is not the same as making real plans to tackle the emissions, and ASDA's total product emissions are still climbing.



HIDE & IGNORE	Unpublished Scope 3 Data	Unpublished Protein Split	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
DISTRACT & PRETEND	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Scope 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
PROMOTE & PROFIT	Prominent Positioning of Meat & Dairy	Meat & Dairy Multibuys	Meaty Meal Inspiration	Prominent Meat & Dairy Advertising

"We are committed to the continuous reduction of our greenhouse gas emissions."

Aldi GB has its head buried firmly in the sand when it comes to the climate impact of its product sales. The British branch of this retailer makes prominent claims to carbon neutrality, [13] whilst failing to point out that this claim doesn't cover the 99.33% of their emissions linked to product sales. [14]

Whilst in Germany, Aldi's parent company has made dietary transition a key pillar of its marketing, the British branch has failed to learn from this progressive step: with minimal engagement with its overall emissions, Aldi GB is badly falling behind, and needs to move in the same direction as its European relatives.



HIDE & IGNORE	Unpublished Scope 3 Data	Unpublished Protein Split	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
DISTRACT & PRETEND	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Scope 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
PROMOTE & PROFIT	Prominent Positioning of Meat & Dairy	Meat & Dairy Multibuys	Meaty Meal Inspiration	Prominent Meat & Dairy Advertising

“As a leading retailer, we know we must play our part in tackling the climate crisis”

Morrisons scores a full house on our greenwash scorecard. The retailer not only fails to publish reliable emissions data, but it fails to take action in-store to make its food environment healthier and more sustainable.

Morrisons hails itself as 'British farming's biggest customer' [29] and has big plans to work with its suppliers to produce 'Net Zero beef'. [17] While reducing the emissions intensity of the meat and dairy it sells is important, Morrisons is failing to acknowledge the urgent need to also reduce the amount of meat and dairy products that it sells. In fact, the retailer continues to encourage people to eat more meat, for instance with their 'More Meat Recipes' banner on their homepage.

The route Morrisons has chosen relies on unproven and potentially misleading 'tech fixes', including 'Net Zero farms': an unproven concept and one that may lull shoppers into a false sense of security on the climate impact of their food. In a similar vein, it hails sustainable packaging such as 'Carbon Neutral Packaged' milk, which presents a small environmental win compared to the food product itself.



HIDE & IGNORE DISTRACT & PRETEND PROMOTE & PROFIT	Unpublished Scope 3 Data	Unpublished Protein Split	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Scope 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
	Prominent Positioning of Meat & Dairy	Meat & Dairy Multibuys	Meaty Meal Inspiration	Prominent Meat & Dairy Advertising

“We’re building a strategy to tackle climate change that is built for the future”

The future seems in shaky hands with Lidl’s failure to transform climate claims into real action. Lidl acknowledges the urgent need to tackle climate change, yet it has no statement on meat and dairy’s climate impact or any mention of sustainable diets, let alone any efforts to reduce the sales of these high-emissions products. Instead, it focuses on electricity and transport initiatives, and gimmicky intensity reductions like its 'carbon neutral cheese', all whilst it continues to promote meat and dairy products through prominent positioning on aisles, multibuy deals, advertising, packaging gimmicks, and meaty meal inspiration.

For the past two years, Lidl has failed to publish its Scope 3 data and figures for meat and dairy. Lidl might talk the talk but the retailer is yet to walk the walk.



<p>HIDE & IGNORE</p> <p>DISTRACT & PRETEND</p> <p>PROMOTE & PROFIT</p>	<p>Unpublished Scope 3 Data</p>	<p>Unpublished Protein Split</p>	<p>No Meat and Dairy Sales Figures</p>	<p>No Statement on Meat & Dairy's Impact</p>
	<p>Dodgy Tech Fixes</p>	<p>More Plant-Based, Not Less Meat & Dairy</p>	<p>Overpromotion of Minor Scope 1 & 2 Initiatives</p>	<p>Using Packaging Given to Sell Meat & Dairy</p>
	<p>Unprominent Positioning of Meat & Dairy</p>	<p>Meat & Dairy Multibuy Offers</p>	<p>Next to No Meat & Dairy Promotion</p>	<p>Promoting Meat & Dairy Advertising</p>

“Helping our customers move to more sustainable diets is big on our agenda”

Co-op's plans have a lot of promise, but sadly, it can't seem to quite grasp the nettle. Whilst the retailer is encouraging people to eat more plant-based food by increasing the size of its vegetarian and vegan ranges, and is the supermarket with the fewest meat and dairy-centred recipes, it has yet to take explicit action to reduce meat and dairy sales. Co-op abandoned its plant-based price match, which is extremely disappointing, and continues to promote meat and dairy in its deals through multibuy offers, promotions, and advertising.

Co-op's figures on protein breakdown are currently unpublished, with no set date for their publication. Moreover, the retailer hasn't published emissions data specific to meat and dairy. Co-op need to knuckle down and start taking solid action on their meat and dairy emissions.



HIDE & IGNORE DISTRACT & PRETEND PROMOTE & PROFIT	Unpublished Scope 3 Emissions Data	Unpublished Productivity	No Meat and Dairy Sales Figures	No Statement on Meat and Dairy's Impact
	Doesn't Reach Fixed Targets	More Plant-Based, Not Less Meat & Dairy	Overpromotion of Minor Line 1 & 2 Initiatives	Using Packaging Gimmicks to Sell Meat & Dairy
	Dominant Position of Meat & Dairy	Meat & Dairy Multibuys	Meaty Meal Inspiration	Promotes Meat & Dairy Advertising

“At the John Lewis Partnership we’ve always taken our environmental responsibilities seriously.”

According to our research, Waitrose is one of two UK supermarkets that acknowledges the need to reduce meat and dairy consumption: “As science tells us - with increasing urgency - we must reduce our dietary reliance on meat and embrace more plant based alternatives”. [30]

But sadly, this seems to be all spin, no win. Waitrose has broadly aligned itself with more regenerative farming, with a big emphasis on welfare. However, the actual detail, mechanisms, and follow-through is exceptionally light. It doesn't publish Scope 3 emissions data, or meat and dairy sales figures. The retailer's increase in plant-based sales isn't met by a reduction of meat and dairy, which it continues to promote through multibuys, advertising, and meaty meal inspiration. Waitrose hails its recipes as being 13% meat-free, but this is below the industry average and not a cause for celebration: a prime example of greenwash.

Iceland



HIDE & IGNORE	Unpublished Scope Data X	Unpublished Provenance X	No Meat and Dairy Sales Figures X	No Statement on Meat or Dairy's Impact X
DISTRACT & PRETEND	Dodgy Tech Fixes	More Plant-Based, Not Less Meat & Dairy X	Overpromotion of Minor Scope 1 & 2 Initiatives X	Using Packaging Gimmicks to Sell Meat & Dairy
PROMOTE & PROFIT	Prominent Positioning of Meat & Dairy X	Meat & Dairy Multinationals X	Industry-led Legislation X	Prominent Meat & Dairy Advertising X

“At Iceland we want to minimise our impact on the planet and give our customers sustainable choices”

For Iceland, there’s lots of talk from up top, but no results on the ground. The Managing Director publicly acknowledged that plant-based eating is a necessary transition, [31] but this has not made it into the company's policies. Whilst Iceland has the largest frozen plant-based range, it has no plans to reduce meat and dairy: it continues to promote cheap animal products and meaty-meals, with only 3 non-meat and dairy recipes.

Iceland's market niche leaves it feeling compelled to fight the battles it thinks it can win. That means new refrigerator tech and plastic reduction. Its focus is to remain as cheap as possible, rather than to help instigate the diet transition that its Managing Director knows is necessary.



<p>HIDE & IGNORE</p> <p>DISTRACT & PRETEND</p> <p>PROMOTE & PROFIT</p>	<p>Unpublished Scope 3 Data</p>	<p>Unpublished Protein Split</p>	<p>No Meat and Dairy Sales Figures</p>	<p>No Statement on Meat and Dairy's Impact</p>
	<p>Dodgy Tech Fixes</p>	<p>More Meat-Pled, Not Less Meat & Dairy</p>	<p>Overpromotion of Minor Scope 1 & 2 Initiatives</p>	<p>Using Packaging Gimmicks to Sell Meat & Dairy</p>
	<p>Prominent Positioning of Meat & Dairy</p>	<p>Meat & Dairy Multibuy Deals</p>	<p>Healthier Implication</p>	<p>Prominent Meat & Dairy Advertising</p>

“The impact of climate change affects all of us and the scientific evidence is clear – urgent action is needed by everyone.”

All the right noises, no clear goals. M&S has very candid messaging on Scope 3, on meat and dairy's impact, and has stated the importance of dietary transition. However, there are mixed messages around decreasing production of meat and dairy, with the only solid policies going toward carbon intensity.

Whilst M&S does monitor the protein split and has given rough figures for the Scope 3 emissions percentage of meat and dairy, it hasn't publicly released exact figures or a full breakdown. The retailer uses greenwashing tactics to encourage meat and dairy consumption, such as hailing small initiatives like dairy milk in reduced plastic packaging. At the same time, it continues to promote the consumption of meat and dairy through advertising, multibuy deals and promotions.

M&S needs to take its earnest messaging and craft meaningful targets and pathways, as well improve the transparency of its data reporting, and make some obvious food environment changes to add to its existing initiatives.

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Note 1:

Tesco have not published data that details the role of meat and dairy in their total Scope 3 GHG emissions. Using available data of Tesco's total emissions [1] and the emissions breakdown of a competing retailer, Lidl, Feedback has estimated Tesco's total emissions from meat, dairy, and fish.

Lidl published a breakdown of their Scope 3 emissions data for 2019/20. [2] In this data, Scope 3 was estimated to be 98.9% of their total emissions. 'Product emissions' were considered a subset of their overall Scope 3 emissions, totalling 92.3% of their total emissions (and 10,082,517 tCO₂e). Of this 'Product' category, 'Meat, poultry and fish' represent 33% of the 'product' emissions, and 'Dairy' represents 17.4% of the 'Product emissions'. Adding these two categories together, we find that 50.4% of 'product' emissions are Meat, Poultry, Dairy, and Fish. This means that these items produce 5,444,559.18 tCO₂e for Lidl.

Assuming that Tesco sell roughly the same proportion of these goods as Lidl, we use Grocery market share data from Statista to scale up Lidl's number to Tesco. Across 2019/2020 financial year, Lidl averaged a market share of 5.9333%, and Tesco averaged 27.025% [3] - making Tesco 4.558 times larger than Lidl by market share. Assuming a similar split in product emissions, this would make Tesco's emissions over the Meat, Poultry, Fish, and Dairy categories 24,816,300.74 tonnes CO₂e.

If this estimate is inaccurate, we would welcome Tesco and its competitors to release a more detailed data for analysis.

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GREENWASHING SCORECARDS IN EUROPE

The indicators for this bingo card have been developed together with colleagues from our sister organisation, Feedback EU. Feedback EU launched a similar scorecard and report in June 2023. In the second half of 2023, our partner, a consumer organization in Spain, will also launch a bingo card.

FEEDBACK GLOBAL

Feedback is a UK-and Netherlands-based environmental campaign group working for food that is good for the planet and its people. To do this we challenge power, catalyse action, and empower people to achieve positive change.

We have established a strong reputation as both an expert voice and practical actor on circular food systems and are regularly called upon by businesses, governments, and civil society to provide evidence and advice on diverse issues, including food waste, industrial (animal) agriculture, aquaculture, and circular food economies.

To move towards a food system that nourishes both people and our planet will require significant changes to our food culture, the food economy and its governance. We are seeking to bring about these changes through a unique combination of campaigning and advocacy, citizen engagement and pilot programmes

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