



› Meating the climate challenge:

Why supermarkets must urgently cut their meat and dairy sales

KEY MESSAGES

- Addressing food system emissions is essential to meeting climate goals to remain below 1.5°C of warming.
- Supporting sustainable diets by eating less meat and dairy is a 'low cost, no regrets' measure to meet food system climate mitigation goals.
- Due to their enormous influence in the food environment, it is unlikely that the UK will achieve rapid reductions in meat and dairy consumption without urgent action from retailers.
- Evidence shows that a range of measures could help retailers meet ambitious year on year targets to reduce UK meat and dairy consumption by at least half by 2030.

1. INTRODUCTION

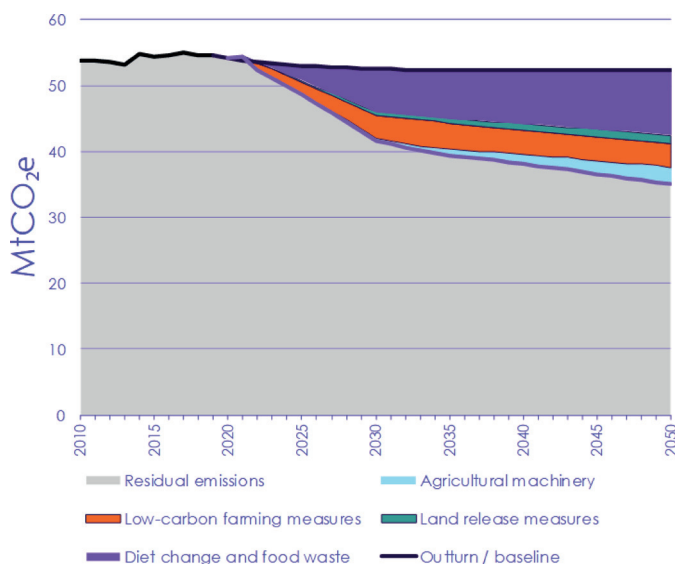
Global food production is the single biggest impact humans have on our planet. Even if all non-food sectors were decarbonising linearly from 2020 to 2050, total emissions from all sectors, including food, would still surpass the 1.5°C emissions limit by 2031¹. It is not possible to solve climate change without addressing our food system: this brief makes the case for why **UK retailers must take immediate and urgent action to support reduced meat and dairy consumption by reducing their offer and sales of meat and dairy**. Current science suggests staying under the 1.5°C emissions limit requires a reduction of 25% at least by mid-decade, to reach a 50% reduction by 2030, compared to a 2020 baseline (see Box 2). The precise level of ambition is contingent on decarbonisation in other sectors and will thus need to be periodically reviewed. Indeed, ambition may need to be raised if decarbonisation in other sectors is slower than anticipated.

Addressing the environmental impact of diets, primarily by reducing the amount of meat and dairy consumed in high-income, industrialised countries (which represent more than their fair share of global consumption), alongside other ‘demand-side’ measures, such as halving food waste (explored in more detail in Feedback’s recent food waste policy brief²), could deliver a fifth of emissions mitigation needed globally to stay within the Paris Agreement’s 2°C limit¹. The UK’s Committee on Climate Change’s (CCC) ‘balanced pathway’ to net zero emissions by 2050 shows diet change and food waste reduction delivering around 60% of overall emissions reductions from the agriculture sector for the UK in 2035 (Figure 1)³. The CCC also reports that, of all their recommendations on land use, a modest 20% reduction in the most carbon intensive foods (i.e. beef, lamb and dairy) has the largest impact on releasing land, as well as results in direct on-farm emissions savings of 6MtCO₂e³.

Moreover, while some measures to urgently decarbonise our economies require the development of new technologies or major infrastructure investments, reducing meat and dairy consumption does not. The CCC describes a transition to healthier diets with less meat and dairy as a ‘low-cost, no regrets’ measure³, with the health benefits of low-meat diets a key co-benefit of this transition.

The UK public on average eats far more meat than is recommended for health: modelling by Oxford University found that meeting the NHS ‘Eatwell’ guide recommendations would require large reductions in average consumption of different products (up to an 89% reduction in beef consumption and 66% in pork consumption, for example)⁴. A 2020 systematic review of 18 academic studies showed ‘consistent evidence across a large spectrum of modelling and empirical studies of

FIGURE 1: SOURCES OF ABATEMENT IN THE BALANCED NET ZERO PATHWAY FOR THE AGRICULTURE SECTOR



Source: BEIS (2020) Provisional UK greenhouse gas emissions national statistics 2019; SRUC (2020); CCC analysis.

Source: Committee on Climate Change. *The Sixth Carbon Budget. The UK's path to Net Zero*. <https://www.theccc.org.uk/wp-content/uploads/2020/12/The-Sixth-Carbon-Budget-The-UKs-path-to-Net-Zero.pdf> (2020)

both positive health effects and reduced environmental footprints (especially lower GHG emissions and nitrogen use) accruing from diets with low environmental impact’⁵³.

The validity and promise of meat and dairy reduction as an essential element of climate mitigation is no longer the subject of real debate. What has been lacking to date has been a clear pathway to realising the benefits of this change, with policy-makers and businesses reluctant to go further than vague acknowledgements of the benefits of dietary change. That is now beginning to change: the UK’s 2020 ‘Nationally Determined Contribution’ to the Paris Agreement recognises the importance of ‘healthy diets supported by a sustainable food system’⁶, and two of the UK’s biggest supermarkets have taken steps towards acknowledging the role of reducing meat and dairy in climate action. Tesco, the UK’s biggest retailer, published in early 2021 a call to action on balanced diets, which places front and centre the importance of meat and dairy reduction. Sainsbury’s discussed the broader role of sustainable diets in its Net Zero by 2040 commitment, published in January 2020, as well as promises to report bi-annually on its sales of ‘both healthy and healthier products’ as a proportion of total sales⁸.

“We will develop and deliver healthy and sustainable diets for all by 2040.”

Sainsbury’s, Net Zero Commitment, 2020

“Our health and the health of our planet are two sides of the same coin.”

Tesco, A Balanced Diet for a Better Future, January 2021



However, while Tesco and Sainsbury's have set a crucial precedent in accepting the importance of dietary change in meeting climate challenges, these commitments must now be made concrete. Across the board, retailers must acknowledge that, for the purpose of achieving climate goals, the greenhouse gas emissions footprint of the products they sell – in the language of carbon reporting, part of their 'scope 3' emissions – is inseparable from their overall environmental impact. Speeches and strategies on how retailers plan to achieve net zero stack up, but no supermarket CEO has yet expressly committed their business to reducing the amount of meat and dairy they sell, as part of a wider effort to take responsibility for and address their scope 3 emissions (see 'A note on measurement').

In the wake of climate change impacts and biodiversity loss being experienced around the globe, this market brief makes the case for why supermarkets, the most powerful corporate actors in the food supply chain, bear significant responsibility for facilitating dietary shifts that reduce the impact of the food system on the planet, and details how these supermarkets could take effective action to meet that responsibility.

2. SUPERMARKETS ARE RESPONSIBLE FOR REDUCING MEAT AND DAIRY CONSUMPTION

As the most powerful actors in the food system, supermarkets' responsibility to achieve the potential of meat and dairy reduction rests on three pillars:

1. The urgency of action on diets;
2. The degree of influences on shopping habits wielded by supermarkets;
3. The barrier to progress if supermarkets fail to take action on this issue.

URGENT ACTION IS NEEDED ON MEAT AND DAIRY CONSUMPTION

It is very clear that industrially produced meat and dairy is fanning the flame of the climate crisis: if unabated, within 10 years, the livestock sector will account for almost half (49%) of the world's emissions budget for 1.5°C by 2030⁹⁻¹². Global demand for meat is only projected to grow,

potentially expanding by 88% from 2010 to 2050¹³. The livestock sector itself, and the amount of land and water used and greenhouse gases it directly generates, is not the only concern. Industrial animal agriculture also heavily relies on purpose-grown soya, with over 75% of the world's soya production ending up in animal feed. In the UK, 71% of soya meal is imported from South America¹⁴, with about half of this directly used in animal feed¹⁵, particularly for the production of intensively farmed pork and chicken¹⁶.

Around half of global soybeans are produced in South America, including in sensitive habitats like the Amazon, the Cerrado and Chaco biomes⁵⁴. This soya production is driving deforestation in highly fragile biomes and is now the second leading cause of climate change globally, after burning fossil fuels, and contributes to unprecedented species extinction, with global mammal, bird, amphibian, reptile and fish populations falling by an average of 68% since 1970¹⁷. Powerful actors in the livestock supply chain, including retailers, have responded to this crisis with the introduction of zero-deforestation commitments and demands of their suppliers. Yet data shows that, during the last decade, soya traders in the Brazilian market with zero-deforestation commitments – Cargill, Bunge, ADM and Amaggi – have been associated with similar deforestation risk to companies that have not made such commitments¹⁸. A recent investigation by Mighty Earth found significant UK retailer exposure to the worst-performing soya producers and traders in the Brazilian market, in particular Cargill, which supplies 70% of UK imports of Brazilian soya¹⁹.

It is in this context that many recent academic papers have spelled out the vital role of eating less meat and dairy in decreasing the environmental burden of our food system. Calculations based on one study published in *Science*, for example, show that, alongside eating a healthy level of calories and halving food waste, shifting diets by 2050 could bring 88% of the emissions reductions needed from within the food system to meet a 1.5°C target^a. Meanwhile, without action to address the land change implications of meat and dairy production, such as those driven by global demand for soya, over 1,200 terrestrial species will lose more than 25% of their current habitats to agricultural expansion²⁰.

BOX 1: THE ROLE OF 'BETTER' MEAT

Discussion of consuming less meat is also often accompanied by the idea of 'better' meat – that is, meat that is produced in ways which improve animal welfare; reduce reliance on particularly damaging production methods, such as use of soya-based animal feed; or improve environmental outcomes, for example through rebuilding biodiversity through agroecological farming approaches²¹. 'Better' meat is a very important piece of the puzzle: animals are a vital part of a sustainable and resilient food system, replenishing soils and contributing to meeting key nutritional needs²². For example, recent modelling of an agroecological future for the UK by IDDRI in partnership with the Food, Farming and Countryside Commission found that, while overall meat consumption would need to reduce to 35 grams per day, there is a role for continued consumption of beef produced within an agroecological system, while envisaging significant reductions in chicken and pork consumption (which are heavily reliant on external feed inputs)²³. While most supermarkets, with the recent exception of Tesco, are not prepared to explicitly talk about their customers buying less meat, many are willing to discuss 'better' meat, usually framing this in terms of sourcing British meat or committing to certain animal welfare standards. While it is important to move shoppers towards choosing currently available 'better' options, such as organically reared or 'Pasture for Life' meat or dairy, this approach must be an accompaniment – not the main course – to an effective move towards less meat and dairy. Acknowledging the issues with only relying on 'better' meat to address problems with industrial livestock production, in late 2020, RSPCA members voted to call for a major cut in meat and dairy consumption for the first time, in a challenge to the organisation's long-term focus on raising standards in animal agriculture rather than reducing it overall²⁴.

One way in which supermarkets have been comfortable talking about meat has been through pledges to reduce meat waste. Several leading retailers have signed up to WRAP's 2020 'Meat in a Net Zero World' pledge, which sets out a plan to make the UK meat industry a 'world-leading example of efficient and sustainable meat production and supply' and focuses on four areas: meat waste in households, business-level meat waste in processing, retailer and hospitality, livestock feed, and productivity improvements in the supply chain²⁵. Although this focus on reducing meat waste is important and necessary, waste reduction must be as a proportion of an overall reduction in the quantity of meat and dairy sold. This is firstly because some forms of meat are so damaging that they must be phased out altogether – such as intensively reared chicken fed on deforestation-linked soya. Secondly, reducing waste, or increasing efficiency,

a Alongside halving food wastes and eating a healthy level of calories, switching to sustainable diets (in the case of this study, 60% less meat) by 2050 delivers a reduction of 1077 Gt CO₂-we compared to total required reduction of 1225 Gt CO₂-we against cumulative 'Business as Usual' food system emissions of 1356 Gt CO₂-we by 2100. See Supplementary materials from Clark, M. et al (2020). Global food system emissions could preclude achieving the 1.5° and 2° C climate change targets. *Science*, 370(6517), 705-708.

only effectively reduces environmental damage if the overall size of the system is limited: a highly efficient system may still be a very damaging one if production grows faster than efficiency improves, so an absolute limit needs to be specified when aiming to remain within finite natural limits²⁶.

SUPERMARKETS PLAY A KEY ROLE IN INFLUENCING FOOD ENVIRONMENTS AND DIETARY OPTIONS

Taken within a 'food environment', decisions about food purchases are deeply guided by the options on offer and the way food is marketed and labelled²⁷. The food environment can be described as: *'the consumer interface with the food system that encompasses the availability, affordability, convenience, promotion and quality, and sustainability of foods and beverages in wild, cultivated, and built spaces that are influenced by the socio-cultural and political environment and ecosystems within which they are embedded'*²⁸.

The UK food environment is currently enabling significant overconsumption of meat and dairy: citizens consume on average around 70 grams of red and processed per day, according to the NHS²⁹ (dietary reference values stipulate 55.5 grams of protein per day for adult men and 45 grams for adult women, though individual requirements will vary⁴). But there is public appetite for change: 43% of UK adults report making the choice to reduce their consumption of meat 'fairly often' or 'all the time' when grocery shopping³⁰. However, it is difficult for shoppers to make these changes alone: despite the increase in popularity of plant-based foods, meat consumption is yet to decline, with the fastest-growing grocery products of 2020 including an increase in purchases of chicken, beef and pork products (7%, 9% and average 15% respectively)³¹ over the last year, as shoppers made up for decreased food service consumption during the pandemic by increasing their consumption of meat at home.

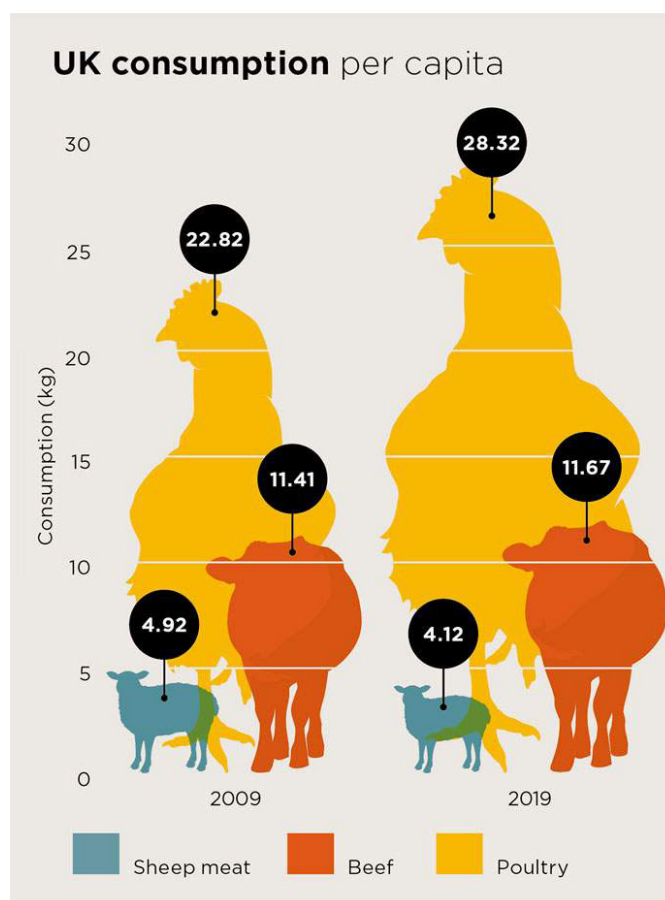
Supermarkets play a critical role in shaping food environments; as such, they are the primary actors contributing to over-purchase of meat and dairy products. With the 'top ten' UK retailers controlling around 94% of the UK groceries market share³², and with 75% of UK citizens saying they visit supermarkets twice or more a week³³, supermarkets are the most important interface between the majority of the population and the wider food system. This influence is not only limited to the in-store experience but extends into customers' homes through branding, package sizes, labelling and advertising, all of which contribute to how UK citizens perceive the food they eat. In fact, the Collaboration for Healthier Lives has evidenced that 'nudges' in-store (e.g. layout of goods, promotions and marketing) can change purchasing decisions⁴⁵, and a 2018 systematic review found three studies demonstrating that interventions which reduce the portion size of meat also reduce the overall consumption of meat products³⁴.

TABLE 1: FASTEST-GROWING GROCERY PRODUCTS OF 2020 (EXCLUDING TOBACCO)

Product	Actual growth (£ millions)	% rise
San Miguel	92	63
Corona	68	40
Stella Artois	105	18
Budweiser	74	18
Sausages	126	17
Pepsi Cola	81	14
Bacon	96	13
Cadbury Dairy Milk	69	12
Beef	162	9
Chicken	120	7

Source: Nielson Scantrack data, reported at <https://www.theguardian.com/business/2020/dec/18/virus-drives-healthy-lager-sales-wipes-180m-makeup>

FIGURE 2: FROM 2009 TO 2019, PER CAPITA UK CONSUMPTION OF POULTRY SIGNIFICANTLY INCREASED, WHILE CONSUMPTION OF BEEF SLIGHTLY INCREASED AND SHEEP MEAT SLIGHTLY DECREASED.



Source: https://www.savills.co.uk/research_articles/229130/298951-0



Sheila Fitzgerald / Shutterstock.com

WITHOUT ACTION FROM SUPERMARKETS, DIETARY SHIFTS WILL NOT HAPPEN QUICKLY ENOUGH

While there is growing interest in sustainable and healthy diets, a shift of the scale needed will be difficult, if not impossible, to achieve without the collaboration and active participation of retailers – one of the few businesses with a reach across geographical locations and communities.

In the past few years, there has been a firm uptick in interest in meat-free products and the yearly discussion of the influence of ‘Veganuary’. Several retailers have recently promoted their increase in plant-based product sales, with Sainsbury’s stating it is the first UK supermarket to sell meat-alternatives in meat aisles⁸ and Tesco setting the first target for an increase in sales of meat alternatives, aiming for 300% by 2025⁷.

Yet, despite all this, meat sales remain steadily high – or even growing, as Table 1 demonstrates. People describing themselves as vegetarian, vegan or even ‘flexitarian’ remain a small proportion of the overall population: a YouGov tracker survey at the end of 2020 put the proportion of the population who describe themselves as vegetarian at 5% and ‘flexitarian’ (mainly vegetarian but occasionally eat meat or fish) at 14%³⁵. And so, while the widespread availability of meat alternatives is undoubtedly a necessary component of the change to low-meat diets, availability by itself is not sufficient: targets and action which aim to reduce meat and dairy must also be part of the strategy, or the imperative will be to sell more of both.

Awareness-raising, which relies on the conceit that consumers make choices based purely on their own knowledge rather than food environments, is unlikely to be sufficient. For one thing, what people say they want with regards to sustainability rarely coincides with their actions³⁶: a survey of over 6,000 shoppers in Brazil, China, the USA and the UK found that, while 65% felt ‘a sense of responsibility to purchase products that are good for the environment and society’, most fail to act on this preference³⁷. For another, as noted above, environments constantly ‘nudge’ citizens towards unsustainable and unhealthy choices²⁷.

Even on issues where shoppers may already be alert to the provenance of the food they are buying, such as around ‘free range’ or ‘higher welfare’ chicken, shoppers’ ability to make the choices they would like is obscured by supermarket practice. In 2019, RSPCA reported that supermarkets encourage shoppers to buy chicken reared in industrial factory farms with vague labels such as ‘higher standards’, photos giving the misleading impression that the chicken was reared outdoors, and special offers on intensively reared chicken³⁸. Feedback has previously highlighted the role of fake farm names on meat labels, such as Tesco’s now infamous ‘Woodside Farms’, which give a misleading impression of how livestock is produced. This is only one example of the way in which current supermarket practices pose a barrier to more sustainable diets, rather than facilitate them.

And finally, change needs to happen fast. To be on track to halve meat and dairy consumption by 2030³⁹, the target

adopted by a wide range of civil society groups under the coalition Eating Better, the UK will first need to reverse the 2020 trend of increased meat consumption, particularly of processed meat, beef and chicken. The best place to start is at the site of those purchases: supermarkets.

3. WHAT NEEDS TO HAPPEN

At the heart of the retail shift towards enabling and promoting healthy and sustainable diets is an essential truth, one that no retailer has yet publicly acknowledged: to change diets to be congruent with a climate-safe future, **supermarkets must sell less meat and dairy**. Retailers must commit themselves to targets to halve their meat and dairy sales, setting year on year reduction targets to support climate goals, currently estimated to be a halving of UK meat and dairy consumption by 2030 (see Box 2).

A range of actions are available to retailers to achieve these targets. Several reports, including by the Behavioural Insights Team, have explored how behavioural nudges can reduce consumption of meat and increase consumption of healthy fruit and vegetables (see Table 2)³⁶. A collaboration between The Consumer Goods Forum, Guy's and St Thomas' Hospital and the University of Oxford found that several interventions trialled in partnership with major retailers resulted in dramatic changes in shopper behaviour: removing free-standing promotions of Easter confectionary resulted in a 22% year on year decrease in

purchases of those items⁴⁴. Another trial, involving the use of promotional cartoon characters targeted at children, resulted in a sales increase of 387% more packs of fruit per week⁴⁵. In the realm of meat-specific actions, the Global Food Security Programme reviewed 44 systematic reviews to recommend that 'low-agency population interventions' can be very effective in reducing meat consumption, particularly when multiple interventions are implemented simultaneously and across the board, and that such interventions are likely to have high public acceptability⁴⁶.

Nudges or other 'low-agency' interventions are not the only options available to retailers. Stronger measures, such as restricting choice by removing some of the most damaging products from shelves, may also be necessary. For example, by committing to not selling chicken fed on Brazilian soya, in view of the impossibility of guaranteeing deforestation-free sourcing of this feed, retailers would, in one decisive action, remove a highly damaging product from shoppers' baskets.

While further research is needed to determine which tactics would be most effective when it comes to meat and dairy reduction, there is no lack of potential candidates with which to begin. Table 2 explores a range of possible measures, taken from studies on behaviour change and consumer trials, organised according to the Nuffield ladder of policy intervention. This ladder enables a clearer view of the range of options available.

BOX 2: HOW MUCH MEAT AND DAIRY SHOULD WE BE EATING IN THE UK?

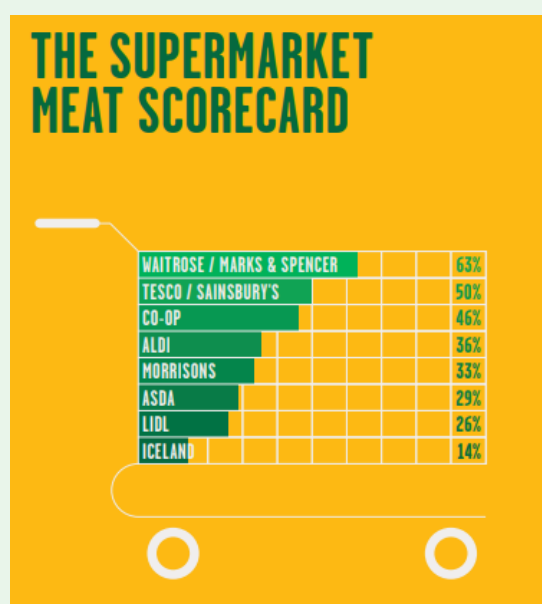
While there is consensus among the scientific community that global meat consumption needs to fall to avoid dangerous climate change^{10,40-43}, arriving at a universally agreed upon science-based target is challenging. Eating Better's target of a 50% reduction by 2030 is a point of consensus among many civil society groups, but a number of variables have led to various academics and civil society groups adopting different targets. One such variable is speed – that is, how quickly meat and dairy consumption must be reduced, as well as the choice between whether this action should be 'front-loaded' (so meat and dairy consumption is reduced quickly between now and 2030, then more slowly) or reduced linearly over a longer period of time. At one end of the scale, Greenpeace, drawing on the EAT-Lancet Commission's evidence, argues for an ambitious target to reduce meat and dairy consumption in the UK towards current global per capita levels by 2030, with no more than 300 grams of meat on our plate per week by 2030⁵². This target is based on principles of equity and justice, with Greenpeace and other groups calling for a 'shrink and share' approach to meat and dairy (and other animal products) globally – that is, high-income, industrialised societies, which historically consume the most meat and dairy and bear a larger burden for the climate crisis, significantly reduce their intake of meat and dairy, leaving room for low-income societies to increase their consumption of these products, if they wish, according to cultural and nutritional contexts. Another issue lies in the difficulty of establishing an accurate baseline of how much meat is currently consumed: self-reporting on diets is notoriously inaccurate, with figures based on carcass weights from meat supply suggesting much higher consumption. A more accurate way to measure progress by retailers would be for them to provide regular public reporting providing regular reporting on how much meat and dairy they sell, as part of their pathway towards achieving reductions in sales. Finally, recommendations on meat and dairy which encompass an economy-wide pathway towards net zero are affected by assumptions, as well as what other measures are taken in the food system - less ambitious action on meat might point towards other policies with higher biodiversity trade offs. If other sectors, such as aviation, fail to decarbonise quickly enough, a much more ambitious reduction in emissions from food systems may be required. In the context of these uncertainties about our path for a sustainable future, it is all the more important that options like dietary change, which are technically feasible and carry many co-benefits for public health, are employed ambitiously. In practice, retailers should adopt ambitious targets which achieve a year on year reduction in meat and dairy sales, and contribute towards reducing national meat and dairy consumption by at least half by 2030, with a longer term goal of 300g per person per week.

TABLE 2: OPTIONS ON THE TABLE FOR RETAILERS TO TRIAL, MAPPED AGAINST THE NUFFIELD LADDER OF POLICY INTERVENTION.
OPTIONS ADAPTED FROM^{36,44,46}.

Options ranked from no action to strong interventions	Eliminate choice	Remove certain types of meat, such as soya-fed factory farmed chicken, from shelves.
	Restrict choice	Sell a smaller range of meat products. Reduce the amount of meat available on shelves at any one point.
	Alter choice through disincentives	Use plain labels, akin to those used on cigarette packages. Remove all branding or marketing on labelling, for example, farm name brands such as 'Woodside Farms' or meaningless labels such as 'higher welfare'.
	Alter choice through incentives	Use novel in-store/app promotions, incentives and games, like meal deals and loyalty schemes. For example, double loyalty card points received for purchasing fresh produce and plant-based foods or for baskets that do not contain meat and dairy products. Ease the change with 'rules of thumb' tips and tricks, like installing a 'sustainability filter' for online shoppers or offering in-store recipe cards and meal kits. Prompt sustainable choices at timely moments, such as one-click substitutions at the point of sale for online grocery sales or printing the environmental impacts of a person's purchases on their receipt.
	Guide choice by changing the default	Edit the choice architecture to make sustainable options more prevalent, more prominent and the default choice, such as by increasing the relative availability of those options or by placing them in more salient locations in the store. Sell meat in small portion sizes. Re-brand plant-based food towards a mainstream identity and promote more mainstream dishes, such as promoting traditional cuisines which involve less meat in cooking and pushing for new plant-based 'power dishes'. Integrate (rather than segregate) plant-based options, meaning vegan and vegetarian dishes should be in the same sections as meat options.
	Enable choice	Market plant-based food as aspirational, delicious and indulgent by, for instance, shifting language, imagery and design.
	Provide information	Raise awareness and build a mandate for strong policy, such as working with influential messengers like TV chefs and cultural influencers.
	Do nothing	

BOX 3: FIRST MOVERS AND LAGGARDS

In 2019, Feedback published a report, *Meat Us Halfway: A scorecard assessing how UK supermarkets are supporting a shift to healthy, low meat diets*⁴⁷. The scorecard assessed the UK's top ten retailers against a range of indicators designed to demonstrate how well they were addressing the challenge of 'less and better meat', if they were addressing it at all. At that point, although many stores had expanded their vegan ranges, only Sainsbury's and Aldi placed these in the meat section. Moreover, six of the top ten supermarkets were selling meat that only complied with the bare minimum regulatory standards. Misleading marketing such as 'fake farm' brands were still prevalent in Aldi, Asda, Tesco and M&S, despite public backlash and concern from the National Farmers' Union. On feed and deforestation, Iceland and Morrison's both had no policy on sustainable sourcing of soya for animal feed. Since 2019, much has changed, and this year, Feedback will repeat this ranking, with an updated set of indicators reflecting changes in evidence and attitudes on both supply chain policy on meat and dairy and in-store practice. Research by the University of Surrey and a brief review of supermarkets' website and press releases in late 2020 indicated that while some supermarkets, notably Tesco, have pointed to the need to reduce meat production and consumption, by and large, supermarkets are ignoring the imperative to reduce meat and dairy sales, opting instead for increasing their plant-based ranges. Even Tesco, the retailer that goes furthest towards acknowledging responsibility for a shift towards more plants and less meat and dairy in its shoppers' diets, does not adopt a target to reduce meat and dairy sales; instead, Tesco commits to the softer and less effective target of increasing sales of meat alternatives by 300% by 2025⁷: a significant commitment, but one that avoids the meat of the matter.





A NOTE ON MEASUREMENT

Research from the Carbon Disclosure Project shows that emissions in the supply chain across all sectors are, on average, around four times greater than those from a company's direct emissions; this figure rises to up to seven times greater for retailers and other consumer-facing companies⁴⁸. These supply chain emissions – the greenhouse gases released in the process of producing the products retailers sell, for example – are referred to as 'scope 3' emissions. Meat and dairy production represent a considerable slice of retailers' scope 3 emissions pie:

Ahold Delhaize, a major European retailer based in the Netherlands, reports that 38% of their scope 3 emissions come from meat, fish, dairy and eggs⁴⁹. Yet, few UK retailers currently report on their scope 3 emissions⁵⁰. Sainsbury's, which announced its Net Zero plan with great fanfare in early 2020, explicitly excludes scope 3 from its target⁵¹. To set and meet meaningful Net Zero targets, UK retailers must not only incorporate measurement and reporting of scope 3 emissions across their entire business but also, given the significant scope 3 emissions generated by meat and dairy production, reduce their meat and dairy sales.

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