

Less meat and dairy in our daily groceries: Why supermarkets urgently need to reduce their climate footprint

Summary of Feedback EU report (in Dutch), [Minder vlees en zuivel in onze dagelijkse boodschappen](#)

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1. Introduction

Our food system is having significant impacts on the planet. Food is responsible for 21-37% of global greenhouse gas emissions, and more than half of these are caused by the production of animal source foods^{1,2}. The livestock sector produces more emissions worldwide than direct emissions from all transport, from cars and ships to airplanes³. In the Netherlands, the damaging environmental impacts from livestock farming – from methane emissions to nitrous oxide and ammonia – are estimated to cost around 4.5 to 5 billion euros⁴.

There is growing support in the Netherlands for eating less meat. In a recent IPSOS poll commissioned by Feedback, 40% of young people (under the age of 35) who responded think that supermarkets should discourage buying meat, and more than a third of all respondents believe that the extra profits made by supermarkets in 2020, during the pandemic, should be invested in strengthening their plant-based and sustainably produced products – at affordable prices⁵.

This report shows why supermarkets in the Netherlands, the most important point of sale for daily groceries for most people, must take responsibility to reduce the climate footprint of the food they sell by at least 55% by 2030, in line with EU targets – this cannot be achieved without addressing the climate impacts of the meat and dairy they sell.

2. The Netherlands: land of meat, butter, cheese and eggs

The Netherlands is now the second agro-exporter of the world and after China the largest trader and processor of soya, of which 89% is exported. Most of the soya for own use (93%) is intended for animal feed, in particular for the production of dairy cattle, pigs and chickens, most of which part are intended for the export of meat and dairy⁶. The Netherlands is the largest meat exporter in Europe; meat sales are earned through meat exports⁷. The majority of dairy production, almost two thirds, is exported⁸. The food system and in particular meat production and dairy is presented as efficient, but the costs in relation to human health, the environment and climate are high.

Global meat consumption has doubled in the last 20 years and is expected to increase by 13% by 2028. In the Netherlands in 2020, shoppers purchased 406 million kilograms of meat from supermarkets and butchers, 6% more than in 2019. Because the catering industry was largely closed due to Corona, the total consumption of meat declined to 2.5% in 2020⁹.

Meat consumption in the country is much higher than the Nutrition Centre's health guidelines and similarly exceeds guidelines to keep our food system within planetary boundaries¹⁰. For example, the EAT Lancet Commission recommends a maximum of 300 grams per week (or 16 kg/person meat consumption annually), which is 3x lower than the current level of consumption in the Netherlands¹¹.

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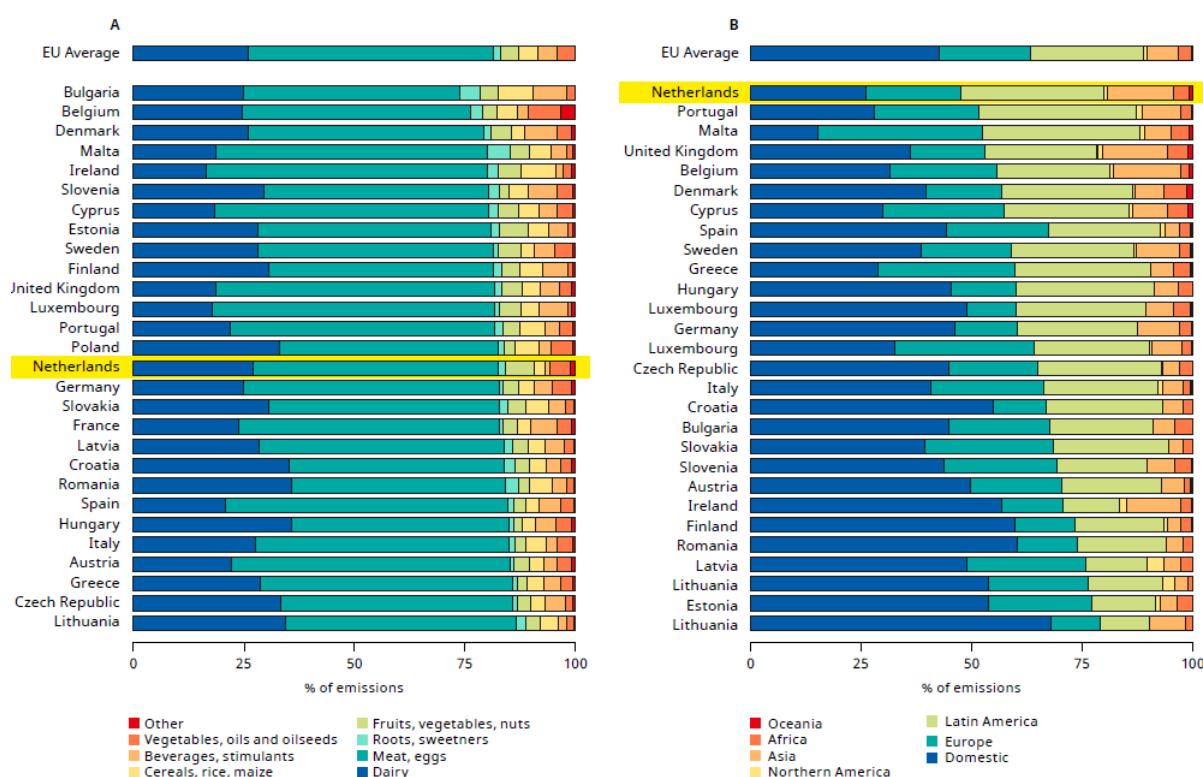
Feedback's IPSOS-commissioned poll shows support for eating less meat. For example, 18% of young people surveyed stated they do not eat meat (compared to 9% in other age groups) and women more often say they do not buy meat compared to men (12% and 6% respectively). This poll further suggests young people in the Netherlands are more likely to consider sustainability more important than older people; additionally, 40% of young people believe that supermarkets should play a role in reducing meat sales⁵. This is supported by Natuur & Milieu's annual Vegamonitor, which shows young people are more aware of the harmful consequences of eating meat and are taking steps to reduce this¹².

Companies are responding to this increasing desire for plant-based alternatives. There are currently 250 companies in the Netherlands producing meat and dairy substitutes, doubled from 2020. Additionally, sales of meat substitutes in supermarkets have doubled to almost €200 million since 2017¹².

3. Climate and meat: the role of supermarkets

The Netherlands has one of the highest food-related climate footprints in the EU, with the vast majority (85%) of greenhouse gas emissions caused by meat and dairy production. Only around a third of the country's food-related greenhouse gas emissions are produced in the Netherlands; approximately half of the Netherlands' greenhouse gas emissions stem from production outside the EU, particularly in South America – linked to soya production and deforestation in, for example, sensitive biomes like the Cerrado and Chaco¹³. This is supported by recent research by Mighty Earth, which found that soya suppliers in the Netherlands are still linked to deforestation, despite supermarkets covering their soya footprint with certificates (RTRS)¹⁴. See Figure 1.

Figure 1 Emissions from food production in the EU by product group (A) and by region (B)¹³



Livestock farming is also a driving force behind the nitrogen crisis in the Netherlands¹⁵.

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Supermarkets in the Netherlands are a major employer, with 4300 stores nationwide and 330,000 employees. The top 5 retailers – Albert Heijn, Jumbo, Lidl, Aldi and Plus – control 80% of the market share; this increases to 84% with the recent merger between Plus and Coop. Not only do these retailers occupy an increasingly dominant position in the food chain, and they determine to a large extent, what is on shoppers' plates.

A review of 18 academic studies from 2020 shows that environmentally friendly diets have both positive health effects and a lower climate footprint¹⁶. Additionally, the Dutch Health Council states that the protein transition – from animal to vegetable products – is necessary for a healthy and sustainable diet¹⁷. The parties to the Dutch Climate Agreement similarly state that an average reduction of 10-15% of total protein intake in the Netherlands is desirable. This could be supported by the EU Parliament's Farm to Fork Strategy, which was adopted in September 2021. If adopted by the EU Member States, it will allow the Netherlands and other EU countries to lower taxes on fruit and vegetables and increase taxes on meat and dairy.

Supermarkets and their association CBL endorse the Climate Agreement. They indicate they will promote climate-friendly products in their stores, but it is unclear how it will be implemented. Supermarkets support the protein transition from the current 60/40 animal/plant-based protein ration to 40/60, but no specific targets and monitoring scheme have been defined.

The Covid-19 pandemic – which brought on homeworking and closures of catering businesses – saw supermarket profits increase; for example, AholdDelhaize saw sales increase by 14.2%, and Jumbo's turnover rose by 14% in the first half of 2020^{18,19}. Feedback's IPSOS-commissioned survey found that 38% of respondents felt that supermarkets should invest this additional revenue in offering more plant-based and sustainably sourced products at affordable prices; 60% of respondents were in favour of giving this profit to farmers and their employees⁵.

This poll further shows that 40% of young people feel that supermarkets should discourage buying meat – double that of older age groups (35-55 years old)⁵. This is supported by research conducted by ProVeg in collaboration with the University of Amsterdam, which found that two in three respondents believe that supermarkets have a role in reducing meat consumption; additionally, three quarters of respondents were in favour of reducing the price of plant products and more than half supported raising the price of animal products²⁰.

4. The influence of supermarkets on the food environment

The recent Food Policy Coalition report, on which Feedback collaborated, highlights the importance of the food environment in enabling shoppers to make sustainable choices²¹; this is supported by a recent report by a Group of Chief Scientific Advisors (European Commission), which argues that today's food environments "exploit people's biological, psychological, social and economic vulnerabilities", making it easier to adopt unhealthy, unsustainable food patterns²². Indeed, a recent European consumer survey shows that shoppers are willing to switch to more sustainable eating habits but currently find it difficult to do so, citing high prices, lack of information, difficulty identifying sustainable food and the limited supply of sustainable food as main barriers²³.

From increasingly sophisticated and subtle ways in which foods are promoted and marketed across multiple channels, including packaging, store layout and experience, advertisements, it is clear that supermarkets wield much power in influencing shoppers' choices. However, this influence is currently driving unsustainable, unhealthy choices. For example, even during the Netherlands' national Week Without Meat in March 2021, six of eight supermarkets surveyed by Questionmark advertised meat products²⁴. According to Feedback's IPSOS-commissioned poll, 75% of respondents felt that price is the most important aspect for shoppers⁵.

To meet climate targets, supermarkets should instead be using their commercial and marketing resources to instead promote healthier and more sustainable, plant-based choices.

5. Supermarket action on climate and reducing meat and dairy sales

Supermarkets have the most purchasing power in the food chain, but evidence to date shows that this power is not being harnessed to substantially reduce the climate footprint of the foods they sell, particularly via reducing meat and dairy sales. For example, although AholdDelhaize has pointed to halving carbon dioxide (CO₂) emissions in its own activities by 2030, these emissions only make up 5% of their total emissions. The retailer also has set a target to reduce emissions across its entire value chain by 15% between 2018 and 2030²⁵ – although this is indeed a first step which other retailers in the Netherlands have not yet taken, it still falls short of the 50% target needed to mitigate climate change, and this target cannot be reached without reducing meat and dairy sales.

Other supermarkets in the Netherlands are also starting to publish their emissions information, which is important for transparency, and AholdDelhaize, Aldi and Lidl have joined the Science Based Targets initiative (SBTi), setting out clearly defined paths to reduce emissions in line with Paris Agreement goals. For example, Lidl estimates that its suppliers are responsible for 75% of all emissions. Lidl is aiming to draw up Science Based Targets by 2026 at the latest; however, it currently does not have a specific action plan²⁶. Aldi expects its suppliers representing 75% of emissions in the production chain to set their own Science Based Targets (based on SBTi) by 2024, and the retailer is planning to announce targets to reduce CO₂ emissions and its progress in early 2022²⁷. Two other major retailers – Jumbo and Plus – have not yet published plans to reduce their Scope 3 emissions.

Several supermarkets have identified the role of meat in their climate footprints and support the protein transition to 40% animal protein and 60% plant-based protein by 2030. For example, Albert Heijn is part of the Green Protein Alliance and has committed themselves to the shared goal that each person in the Netherlands will get 50% of their protein from animal sources and 50% from vegetable sources. Additionally, Albert Heijn, Jumbo and Aldi have expanded their vegetarian sections, and Albert Heijn is aiming to double their sales of plant-based alternatives in 2021 (versus 2020)²⁸. Aldi has plans to expand its vegetarian and vegan options (offering 27.4% more products in 2020 versus 2019), and Jumbo likewise has indicated they are aiming to increase the turnover of plant-based alternatives from 4% in 2020 to 10% in 2025²⁹. However, specific targets to reduce the supply of animal products are lacking at the 5 major supermarkets in the Netherlands²⁷.

Transparency and periodic public reporting are critical for monitoring progress against supermarket objectives on climate and meat and dairy sales. However, supermarkets are currently lagging on transparency. Last year, the Dutch House of Representatives adopted a motion asking the Ministry of Agriculture to make an agreement with supermarkets on annual reporting and making their products more sustainable³⁰. The outgoing Minister of Agriculture is also critical of supermarkets and has indicated she wishes to increase pressure on them³¹.

AholdDelhaize's Climate Strategy Report indicates Scope 3 emissions make up 95% of all the retailer's emissions; of the purchased goods and services, which make up almost 91% of Scope 3 emissions, animal products (meat, fish, dairy, eggs) contribute 42%³². Aldi has similarly indicated that 95% of emissions from the retail sector are Scope 3²⁷. The British Retail Consortium (BRC) has found that Scope 3 emissions make up around 86% of total greenhouse gas emissions in supply chains; thus, it is likely these figures are similar across other supermarkets in the Netherlands, which are not currently reporting their Scope 3 emissions.

Also important is transparency on the amount of meat and dairy sold by supermarkets. Currently, Albert Heijn is the only major supermarket in the Netherlands that has publicly identified the ratio of the protein products it sells, stating 70% is from animal source foods and 30% from plant-based foods²⁸. In 2020, 12% of the retailer's turnover came from meat, poultry, fish and meat products; for eggs, cheese and dairy, this was 11%. Lidl has recently indicated that animal products (covering fresh and cold meat, fresh dairy, fresh fish, eggs) contribute to a quarter of turnover from food³³. Ekoplaza, another supermarket (though not in the top 5) has recently sharpened its ambition to offer more plant-based products and lead in the protein transition, with animal products versus vegetarian and vegan products making up 56% versus 44% of its 2021 turnover, respectively³⁴. The other large supermarkets have not yet made public moves on this issue.

6. Supermarkets must take responsibility for drastically reducing their climate footprint

As the most influential players in the food system, supermarkets need to reduce their climate footprint by taking action in the following areas:

- **Ambition to set a climate target** to reduce total greenhouse gas emissions in the entire production chain (scope 3) by at least 55% by 2030 in accordance with EU policy, and to develop, implement and monitor a specific action plan to achieve this¹.
- **Less meat and dairy:** Setting specific targets to reduce meat and dairy sales by 2030, and developing, implementing, and monitoring a specific action plan to achieve this. Halving sales of meat and dairy is necessary to achieve climate goals.
- **Transparency about the climate footprint** of food across the entire chain – Scope 3 emissions – and specifically on the amount of animal and vegetable proteins in the chain. Without transparency, it is impossible to set goals and report on them publicly.
- **Offer better meat and dairy** by taking measures, such as guaranteeing that there is no deforestation in the chain and preventing harmful antibiotics and pesticides from being used.
- **Adapt the food environment** in the stores, by promoting different products, better positioning on the shelves, offering lower prices and more promotion of legumes, nuts, vegetables, and fruits, so that healthy and sustainably produced plant-based foods become the new normal.
- **Adapt the corporate culture** from the boardroom to the workplace and vice versa, so that there is an internal incentive that is linked to climate and sustainability efforts, not just profitability, and ensure sufficient capacity and training for the transition to more plant-based, climate-friendly food.

About Feedback EU

In August 2021, Feedback founded its sister organisation Feedback EU in the Netherlands. This will scale up climate and food campaigns in Europe, building on a long history of collaboration with European organisations, including through long-term Horizon 2020 partnerships, events, and campaigns, and we are excited to have the opportunity to deepen and build on these alliances in collaboration with our European friends and allies.

Feedback EU will expand our retailer, investors, and policy-focused campaigns in relation to meat and livestock, aquaculture and food waste to broaden our impact in Europe, strengthen

our involvement with EU food policy development, civil society coalitions, and funders to create change within EU governments, EU institutions, supermarkets, livestock companies and investors, many of them based in Europe. We are also seeking to cross-fertilise experiences and results between the UK (post-Brexit) and the EU.

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