

Driving change in the food system



Impact Report Questionmark 2025



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2025 - The year we reached Europe's biggest retailers

Letter from the director

When I look at the state of our world today, it's easy to feel overwhelmed by the scale of the challenges we face. From accelerating climate change and biodiversity loss, to the rise of lifestyle-related diseases, and the exploitation of workers in global supply chains, these crises can feel disconnected. But they aren't. At Questionmark, we see clearly how they all root back to a single, broken system: how we produce and consume food. That is why we do what we do. We are driven by a shared, urgent commitment to reshape this system into one that is genuinely healthy, sustainable, and fair.

Over the past year, our team has worked tirelessly to generate evidence, analyze data and trends, and engage stakeholders, all to create meaningful, measurable impact. A major milestone of 2025 was the publication of Superlist Environment Germany, which allowed us to benchmark Europe's largest supermarkets, challenge and support them to take more responsibility for environmental sustainability. I am incredibly proud of the insights and actionable recommendations we provided to the supermarkets, the collaboration with German civil society partners, as well as the immediate progress we are already witnessing within the sector.

This impact report captures the concrete outcomes of all our efforts and the progress we realised in 2025. We are proud to share these insights with you; our partners, funders, supermarkets, civil society organisations, and the wider community. Looking back, 2025 has been a defining year, not just for the immediate change we created, but for the seeds of future impact we planted.

As we look ahead, we aim to ensure Questionmark continues to ignite a race to the top, foster sector collaboration and drive effective regulation. Together, we can build a food system that truly works for people and the planet.

Charlotte Linnebank
Director Questionmark



Ambre, Charlotte, Deborah, Dore,
Erik, Gustaaf, Harald, Nina, Puck

About Questionmark

An independent think tank for a healthy, sustainable and fair food system

Vision

We envision a world with a liveable climate, thriving biodiversity, a fair society, and good health for all. Realising this vision requires reversing several persistent negative trends rooted in today's food system. Within this system, food retail chains are the most influential actors.

How?

We leverage the influence of food retail chains - either directly or via government regulation.

The challenge in the food system

At least 70% of all food purchased by consumers is bought from supermarkets. These retailers not only affect how their suppliers produce food upstream, but also shape consumption patterns downstream, making them extremely influential actors in the food system.

70%

of our daily food is
purchased
in the supermarket

The problem

Over time, prioritising financial gain translates into wider societal issues in three domains:

Health

By 2035, over half the world may be overweight or obese, increasing risks of chronic diseases. Shaping food environments to support healthier, sustainable choices is essential, as nutrition and sustainability are closely connected.

Environmental sustainability

Our food system is harming planetary health, driving climate change, biodiversity loss, and land degradation, and accounts for over a third of greenhouse gas emissions. Urgent action is needed to create a future-proof system that promotes healthy, sustainable choices.

Human Rights

The current food system often fails to respect human rights. Farmers earn too little to support their families or adopt sustainable practices, and women face unequal pay or job insecurity during pregnancy. A future-proof food system must be fair to everyone involved in food production.



Our strategy

To transform the food system into one that is healthier, more environmentally sustainable, and fair, we leverage the influence of food retail chains - directly or through government regulation. We drive this change through three pathways.

Our pathways for change

Race to the top

We spark competition at (inter)national levels by benchmarking Europe's largest food retailers and combining research with civil society campaigning and strategic media exposure.

Collaborative Action

We bring together retailers, suppliers and market authorities to address shared challenges and aim for sector agreements on collective measures.

Institutionalisation

We advocate for a level playing field and government monitoring by (un)solicited advice, and feeding public and political debate.



Overview of Questionmark's projects and publications in each domain across our pathways for change

	Race to the top	Collaboration	Institutionalisation
Health	Superlist Health (NL)		Advice Wheel of Five (NL) Alcohol promotions Regulating multi-buys
Environment	Superlist Environment (DE)	Benchmark Bio Organic (dairy) in the supermarket (NL)	Government Dashboard Sustainability Supermarkets (NL)
	Superlist Environment (NL)	Sector agreement protein transition (NL)	
Human rights	Superlist Social (BE & NL)		

2025 in numbers

Driving change



9

countries



35

retailers



15

publications



Progressing supermarket commitments

► Climate target

5/6 Dutch supermarkets

5/6 German supermarkets

► Protein split target

6/6 Dutch supermarkets

1/6 German supermarkets

► Organic sales target

5/6 Dutch supermarkets



Building the movement

20

collaborations with civil society organisations



Igniting public debate



189

media hits



9

interviews



We want to make stronger agreements with supermarkets on a larger share of healthy products in sales.

Vincent Karremans (secretary of state)
in letter to Dutch parliament

Reports like Superlist Green keep the conversation about sustainability going, something we can only encourage.

spokesperson Albert Heijn, [Source](#)

This recognition and this report [Superlist Green the Netherlands] are not an endpoint, but rather a motivation to create even more impact.

Peter de Roos, CEO Lidl Netherlands. [Source](#)

Facilitating dialogue

5

Hosted events

1

multi-stakeholder
symposium
Germany

60 stakeholders
13 retailers

3

supermarket
consultation
meetings

33 retailers

1

multi-stakeholder
seminar
Netherlands

72 stakeholders
6 retailers

5+

Guest presentations / public speaking

To name a few:

- Lidl Belgium Stakeholder Forum
- Nyenrode
- Autoriteit Consument & Markt
- Consumentenbond
- Gastcollege HAS Green academy & Universiteit Utrecht



Signs of progress in supermarkets and governments that Questionmark contributed to

Impact timeline



Health

- ▶ **Danielle Jansen (NSC parliament member):** questions alcohol promotions in supermarkets.
- ▶ **Albert Heijn (NL):** target healthy sales.
- ▶ **Dutch secretary of state, Vincent Karremans - Letter to parliament:** “stronger agreements with supermarkets on a larger share of healthy products in sales”
- ▶ **Dutch integrated prevention strategy:** “we will monitor supermarket’s sales of healthy food”.
- ▶ **Multibuys in public debate (NL).**
- ▶ **UK government:** multibuys banned in supermarkets.



Environmental sustainability

- ▶ **Dutch government:** organic sales in supermarket dashboard.
- ▶ **Lidl (NL):** 70% meat substitutes healthy.
- ▶ **Dutch government:** Questionmark research ‘Sustainability claims supermarkets’ published.
- ▶ **Jumbo (NL):** asks supermarkets to stop meat price promotions.
- ▶ **Dutch government:** Biomarktmeter launched - dashboard organic market.
- ▶ **Albert Heijn (NL):** disclosure methane emissions.
- ▶ **Lidl (NL):** climate roadmap published
- ▶ **Albert Heijn (NL):** non-certified fish products published
- ▶ **Dirk (NL):** carbon emissions will be reported.
- ▶ **Delhaize (BE):** protein split target.
- ▶ **Rewe (DE):** protein split & target.
- ▶ **Aldi Süd (DE):** protein split.
- ▶ **Ahold Delhaize (Int.):** protein split target.
- ▶ **Lidl (Int.):** target healthy and sustainable products in 31 countries.

Netherlands’ Albert Heijn Becomes First Supermarket Globally to Report Methane Emissions



Human rights

- ▶ **Jumbo:** Living income for private label cocoa products by 2029.





Race to the top

Questionmark's activities that sparked competition among retailers in the race to the top.



6

Supermarkets



>75%

Market share



5

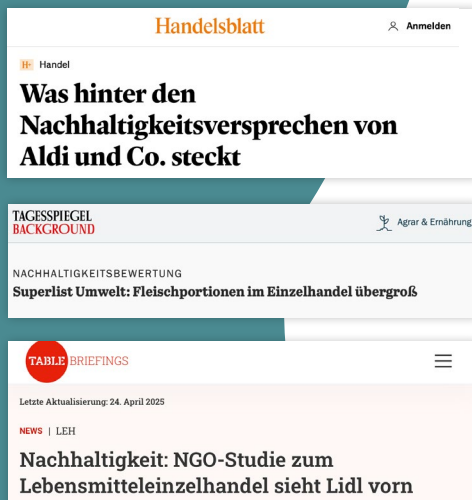
civil society organisations



35

Media hits

Igniting the public debate with our insights:



Superlist Environment Germany

Germany is home to four of Europe's five largest retailers. Yet, transparency, targets and retail practices lag behind. Sparking a race to the top among these retailers has enormous potential to raise the bar not only in Germany but also across borders in the European market.

What we did

Exchanging insights with retailers for progress in nature and climate

Questionmark organised a consultation seminar which was attended by 3 major retailers and 5 civil society partners. We successfully established transparency and understanding on what environmental topics, like climate, protein shift and sustainable agriculture, German retailers should measure and report on.

Setting the baseline of environmental performance

This baseline measurement of sustainability efforts of Germany's supermarket industry resulted in widespread dissemination of findings through media and civil society organisation-led campaigns.

A first multi-stakeholder dialogue

Questionmark created a constructive environment amongst 70 stakeholders and 13 retail representatives. We facilitated dialogue on the clear need for harmonised methods and reporting on the protein split.

Supermarkets in scope



What we achieved

Impact at supermarkets and government that are, in part, due to Questionmark's work and in collaboration with our partners.

▶ **Rewe & Aldi Süd publish protein splits, Rewe also sets a target.**

▶ **German Secretary of State: "Alternative products to animal-based foods as a contribution to a more sustainable diet"**

[Link to project](#)





6

Supermarkets



>70%

Market share



4

civil society
organisations



112

Dutch
media hits

**Igniting the public debate with
our insights:**



Superlist Green the Netherlands

Since 2021, Questionmark has benchmarked the environmental performance of Dutch supermarkets and followed the increased transparency and target setting. Continuous monitoring gives valuable insights as to how supermarkets are on track to individual and government targets and a powerful motivation for change.

What we did

Exchanging insights with retailers for progress in nature and climate

Questionmark brought together all 6 supermarkets to create a shared understanding and windows of opportunity for supermarkets to update their policies and practices to be reflected in the Superlist benchmark on the topics climate, protein shift, sustainable agriculture, deforestation, fish, packaging.

Driving competition on environmental performance

The third edition highlighted progress in transparency driven by competition among supermarkets and government monitoring.

Public reactions supermarkets to the publication

"This recognition and this report [Superlist Green the Netherlands] are not an endpoint, but rather a motivation to create even more impact"

Peter de Roos, CEO Lidl [Source: linkedin](#)

"The supermarket [Dirk] announces to publish a report on emissions and other sustainability information in february"

[Source: Volkskrant](#)

Supermarkets in scope



What we achieved

Impact at supermarkets and government that Questionmark's work contributed to in collaboration with our partners.

Increasing transparency in time for data collection of this Superlist:

- All supermarkets, but Dirk, publish CO₂ emissions
- Lidl published climate plans
- AH validated its protein split data, in accordance with Superlist requirements, and published a list of non-certified fish products.
- Albert Heijn became the world's first supermarket in the world to report methane emissions

Albert Heijn, Jumbo and Lidl remove threatened atlantic mackerel from their product ranges. [Source](#)

[Link to project](#)





6

Supermarkets



>70%

Market share



8

Media hits

Igniting the public debate with our insights:



Benchmark Organic (NL)

If the Netherlands is to achieve its national target of 15% organic agriculture by 2030, a steep increase is required. We look at supermarkets to play a role in this, as they play a role in shaping a sales market for organic farmers and consumers.

What we did

We introduced the Benchmark Organic to give extra incentive for organic farming in preparation for Superlist Green the Netherlands later in 2025. This comparison of supermarkets efforts to grow organic sales led to increased transparency and target setting. More importantly, the share of organic produce in supermarket sales has already seen a gradual increase.

Supermarkets in scope



What we achieved

Impact at supermarkets and government that Questionmark's work contributed to in collaboration with our partners.

Five out of six in-scope supermarkets set targets on their total organic sales or organic produce specifically.



[Link to project](#)





11

Supermarkets



>70%

Market share



5

civil society
organisations

Superlist Social Belgium & the Netherlands 2026

Human rights violations in global food supply chains are widespread and systemic. With the Corporate Sustainability Due Diligence Directive (CSDDD) on the horizon, supermarkets must apply responsible procurement practices.

What we did

Exchanging insights with retailers to better safeguard human rights in supply chains

Questionmark established the foundations for this Superlist by bringing together 10 Belgian and Dutch supermarkets to create a shared understanding of how their human rights policies will be benchmarked in the research. Namely on the topics of: Living wage and income for workers and farmers, safeguarding women's rights, transparency on high risk supply chains.

Supermarkets in scope

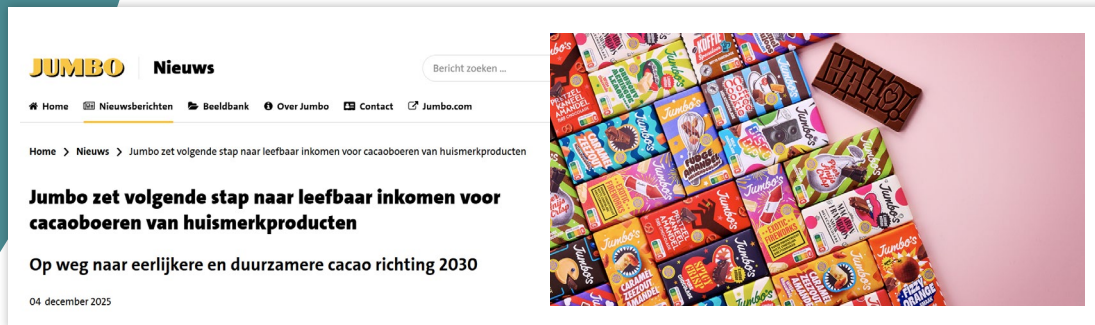


What we achieved

Impact at supermarkets and government that Questionmark's work contributed to in collaboration with our partners.

Jumbo announced that by 2029 all private label cocoa products will ensure a living income, by 2027 this will be implemented in 50% of the private label assortment.

[Source: Jumbo](#)



[Link to project](#)





Collaborative action

Questionmark's impact in our projects that has facilitated collaborative action among supermarkets



6

Supermarkets



72

Stakeholders

Organic in the supermarket (NL)

The Netherlands needs to grow its organic agricultural land to reach the national target for 15% organic agricultural land by 2030. Questionmark is encouraging supermarkets to harness their potential to give strong signals and incentives to the market.

What we did

At this multi-stakeholder event, Questionmark convened the six major retailers, dairy companies such as Friesland Campina, and key producers such as HAK. We successfully expanded the dialogue about organic from a supermarket-centric view to a whole-sector approach and secured the initial connections to initiate dialogue on collective action for the coming year.



What we achieved

Impact at supermarkets and government that are, in part, due to Questionmark's work and in collaboration with our partners.

▶ **Lidl has set the goal to reach 4% turnover in share of organic in the total range.**

▶ **Government update Dashboard Sustainability Supermarkets, now including indicator on organic sales.**

[Source](#)

[Link to project](#)



6

managers retail
+ dairy



72

Stakeholders

Organic dairy in the supermarket (NL)

After encouraging supermarkets to set targets for a growth in organic sales overall, Questionmark now looks specifically to organic dairy. More than half of the agricultural land in the Netherlands is used for grassland, mainly for dairy farming. A growth in the demand for organic dairy will give a powerful drive to more organic agriculture.

What we did and achieved

Questionmark hosted seven decision makers from supermarkets, A-brands, milk producers and CSO's at The Annual Dutch Plant the Future Dinner for, which served as the strategic launchpad for our focus on stimulating the organic dairy sector. This kick-off secured the high-level alignment, setting the stage for collaborative policy work that will define our impact in the coming year.



[Link to project](#)

Sector agreement protein transition (NL)

The transition from animal to plant-based consumption is stagnating in supermarket sales, while this is key in reducing emissions and protecting nature. Competition among retailers can only go so far. Simultaneously, we are facilitating dialogue to explore collaboration among the sector.

What we did

We have joined forces with civil society organisations, agriculture, business, science and government to launch a Plant-Based Action Plan. Questionmark is spearheading the efforts to align the Dutch supermarket trade association, CBL, and influential supermarket chains with this initiative.

What we achieved

Impact at supermarkets and government that are, in part, due to Questionmark's work and in collaboration with our partners.

Jumbo calls on other supermarkets to follow its initiative to stop price promotions on meat. [Source](#)

[Link to project](#)



Institutionalisation

Overview of Questionmark's advocacy for a level playing field through government regulation

Alcohol promotions (NL)

Dutch supermarkets are promoting more alcohol, despite their commitments in the National Prevention Agreement to encourage healthy food choices. Reason to use our insights to spark the debate.

What we did

Our factsheet served to substantiate advocacy to regulate alcohol promotions in the Netherlands. The doubling of alcohol promotions over the past four years reached headlines in the Dutch newspapers, radio and tv. The public debate supported political advocacy efforts.

Supermarkets in scope



What we achieved

Impact at supermarkets and government that Questionmark's work contributed to in collaboration with our partners.

Dutch member of parliament Danielle Janssen questioned the Secretary of State on Health. [Source](#)

- "Are you aware of the research by Questionmark?"
- "To what extent are you considering regulation to ban advertisement and promotion of alcoholic drinks in supermarkets, similar to the restrictions on tobacco advertising?"

Igniting the public debate with our insights:



[Link to project](#)





3

civil society
organisations



5

Media hits

Igniting the public debate with
our insights:



Regulating multibuys (NL)

The Dutch supermarkets are full of multi-buy deals (“3 for the price of 2”, “1+1 free”). Contrary to popular belief, these do not help save customers money and are proven to lead to higher consumption of unhealthy food. The introduction of a ban on volume promotions in the UK brings momentum to raise the discussion of regulating such marketing in the Netherlands.

What we did

We mobilised influential civil society organisations including Consumentenbond and Foodwatch and introduced the issue to the public debate through national media coverage. This approach has established a robust foundation for targeted political advocacy throughout 2026

What we achieved

Impact at supermarkets and government that are, in part, due to Questionmark’s work and in collaboration with our partners.

Secretary of State. Letter to parliament:

“I will leave it up to the following members of parliament whether measures similar to those in other countries, such as the UK [ban on multi-buys], have a place in the Dutch approach to a healthy weight”

Letter Secretary of State, Judith Thielen.

Foodwatch, a consumer rights NGO, raises multi-buys in the Obesity Debate during a panel discussion with Secretary of State, Judith Thielen

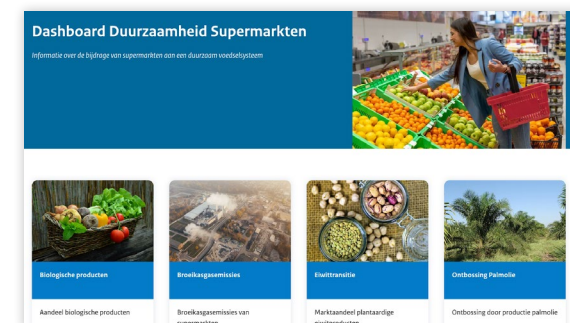
[Link to project](#)

Dutch government dashboard sustainability supermarkets (NL)

The Dutch government is the first to monitor supermarket’s sustainability efforts. Our focus is on ensuring the annual updates take on the most important issues and indicators.

What we did and achieved

Inspired by Questionmark’s Superlist, the Dutch government introduced the Dashboard Sustainability Supermarkets, to monitor supermarkets’ sustainability efforts. Our greatest impact this year following Questionmark’s advocacy efforts is the expansion of the dashboard with organic sales in supermarkets.



Looking ahead to 2026

In 2026, we will continue to leverage the influence of food retailers, directly through market dynamics and collaboration, and indirectly through government regulation. We have sharpened our geographical focus and selected countries where we aim to expand our impact, building on the Dutch experience as a leading example. The strategic countries are Germany, France, Poland, Spain, the United Kingdom, and the Netherlands.

Questionmark aims to continue driving systemic change across Europe, combining our strategic pathways.

Questionmark will examine the role of organic production within the strategies and ambitions of major food brands and producers. We will continue to advance our publications, including Superlist Europe Environment 2026, Superlist Social the Netherlands & Belgium, and Superlist Environment Belgium.

At the same time, we will deepen engagement with the largest actors - particularly retailers - through dialogue, public debate, and hosting roundtables and events.

We will continue advocating for stronger regulation of multibuy promotions and work to build broader international support for government-led dashboard monitoring to improve transparency and accountability across the food system.

The work ahead is ambitious and we will be fundraising to secure financial resources that make our programmes possible. Join us in making these programmes a reality.

We look forward to answering our questionmarks for 2026

- ▶ Will supermarkets report their scope 3 emissions?
- ▶ Will supermarkets stop meat promotions?
- ▶ Will the French government monitor supermarkets environmental performance?
- ▶ Will the Netherlands follow the UK in banning multibuys?

Questionmark

Contact information

Would you like to learn more or collaborate with us on a more healthy, sustainable, and fair food system? Please feel free to get in touch.



Funding

Our sincere thanks go to:

